



HELIX HEALTH

User Manual



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Introduction

Welcome to Helix Practice Manager the award winning software product that has been developed by Helix Health to meet the specific needs of the Irish General Practitioner. Helix Health is the ultimate general practitioner, clinical and practice management system. In choosing this package you are providing the practice with the tools and the latest technology to make your work easier. Using our software to assist you in the day to day running of your practice you will reduce administrative burdens and manage your time more effectively.

Helix Practice Manager meets the GPIT Accreditation requirements and so qualifies for suitable HSE funding.

It has also achieved the 2009 quality label, or seal, awarded by the European Institute for Health Records (EuroRec).

Helix Practice Manager (HPM) effortlessly handles acute and repeat prescribing, consultations, referral letters, accounts, clinical protocols, electronic Lab results, Co-Op messaging and Text Messaging. It allows quick and easy access to all of your medical records and is extremely user friendly. There are no complicated commands to memorize – everything you need is at your fingertips.

Your training course will cover all aspects of HPM but to quickly acquaint yourself with HPM and to take full advantage of its capabilities we recommend that you go through this manual. The step by step instructions are clearly illustrated with screen captures and the text is clear and concise. Any unfamiliar terms are explained in the glossary

Starting HPM

To open the HPM package, double-click on the Helix Practice Manager icon on your desktop.



This will open the Log-in screen. Type in your Username and Password and click **OK**

Version 1.9.5.42414

HELIX HEALTH

National GPiT Group EuroRec Compatible with Windows 7

User name:
pm

Password:

The information contained in this software package is intended to supplement the knowledge of health care professionals regarding drug use and drug interactions. This information is advisory only and is not intended to replace sound clinical judgment on the part of the health care professional. Therefore, although the information is derived from medical literature and research and is subject to review by professional drug systems, the user of this software assumes sole responsibility for any decisions made or actions taken based on the information contained in this software. As set forth in greater detail in the user's license agreement, professional Drug systems and Medical Information Systems disclaim all warranties regarding such information whether expressed or implied, including any warranty as to the quality, accuracy or suitability of this information for any particular purpose.

****Using this product indicates acceptance of these conditions****

Press OK to accept or Cancel to exit

Ok Cancel

Patient Registration and Search Module

Administration – Entering Patient Type

A number of fields in Patient registration contain drop down list boxes. As part of the initial set up of HPM these should be populated to suit the practice. These can be edited at any time.

- To edit this list click on the Administration tab at the top of the screen



- Click on Other Settings and then click on Lists and Drop downs
- Click on the + beside Patient to expand the list.
- Click on the list you wish to edit. e.g. Patient Type
- To add a new type click on Add – Type in title and the default prescription type. Click OK. This is now added to the list.

- To edit an existing type click on Edit and make the necessary changes. You can also make a type

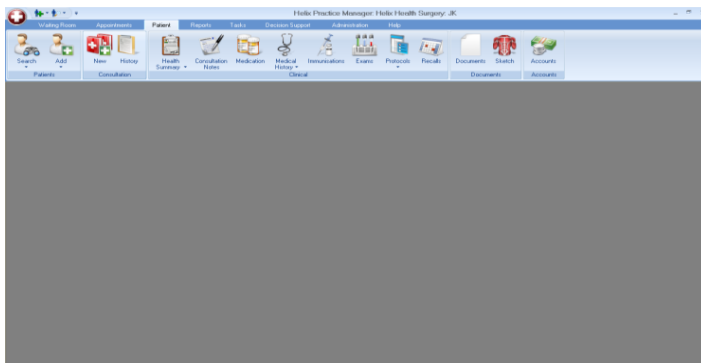
inactive by ticking the 'Is inactive' box. This will ensure that this type will not appear in the drop down list


- To reactivate a type, simply click on the type and click Activate. This will put the type back on the drop down list in patient registration

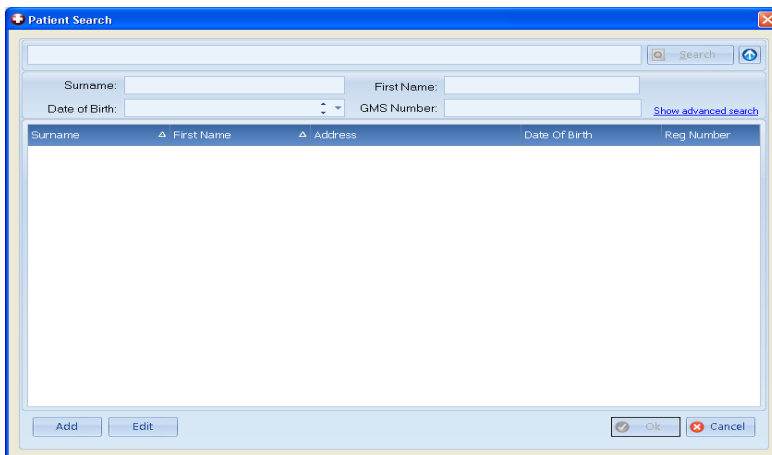
Registering a patient in HPM

There are three ways to register a patient in HPM

- On the very top left of the screen you will see two small icons. You can use these icons search for or to add a new patient

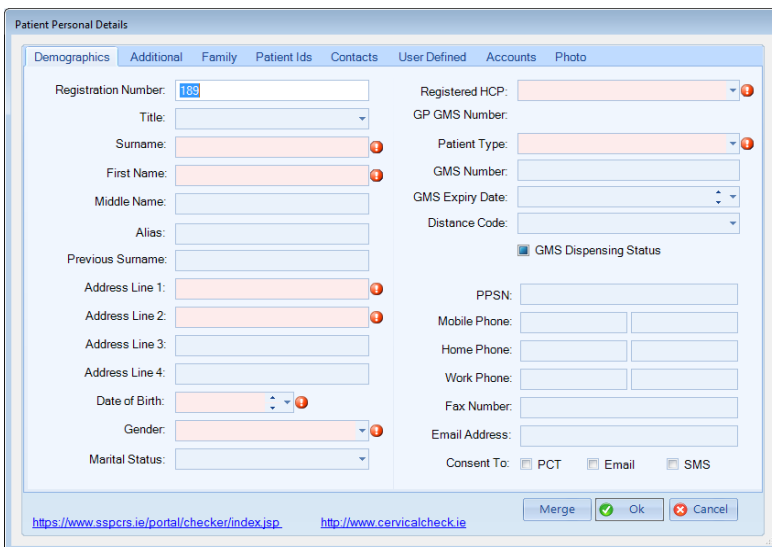


- Click on Patient on the top toolbar and click on the New Patient icon  or click Add.
- In patient search you can click on ADD – this will open the patient registration page.



The 'Patient Search' window features a search bar at the top with a magnifying glass icon and a 'Search' button. Below this are input fields for 'Surname:', 'First Name:', 'Date of Birth:', and 'GMS Number:'. A 'Show advanced search' link is located to the right of the 'GMS Number' field. The main area of the window is a large table with columns: Surname, First Name, Address, Date of Birth, and Reg Number. At the bottom, there are 'Add' and 'Edit' buttons on the left, and 'Ok' and 'Cancel' buttons on the right.

When you click on either icon to add a new patient the following screen will appear:



The 'Patient Personal Details' window has a tabbed interface with tabs for Demographics, Additional, Family, Patient Ids, Contacts, User Defined, Accounts, and Photo. The 'Demographics' tab is active, showing various input fields. On the left, there are fields for 'Registration Number:' (with '189' entered), 'Title:', 'Surname:', 'First Name:', 'Middle Name:', 'Alias:', 'Previous Surname:', 'Address Line 1:', 'Address Line 2:', 'Address Line 3:', 'Address Line 4:', 'Date of Birth:', 'Gender:', and 'Marital Status:'. On the right, there are fields for 'Registered HCP:', 'GP GMS Number:', 'Patient Type:', 'GMS Number:', 'GMS Expiry Date:', 'Distance Code:', 'GMS Dispensing Status' (a checkbox), 'PPSN:', 'Mobile Phone:', 'Home Phone:', 'Work Phone:', 'Fax Number:', and 'Email Address:'. At the bottom, there are 'Consent To:' checkboxes for 'PCT', 'Email', and 'SMS', and 'Merge', 'Ok', and 'Cancel' buttons. Two URLs are displayed at the bottom: <https://www.sspcrs.ie/portal/checker/index.jsp> and <http://www.cervicalcheck.ie>.

The areas with a red exclamation mark are mandatory fields and must be filled in to register the patient. The easiest way to move from field to field is by the tab key on your keyboard. There are a number of tabs across the top of the screen which are not mandatory fields.

A number of fields in patient registration contain drop down boxes. When you click the arrow beside one of these fields a box with a predefined list of options drops down

Demographics

This is the main screen in patient registration and the only one with mandatory fields.

The purpose of each field in the demographics box is explained in the table below.

Details must be entered in the fields in red for the record to save.

Field	Enter
Registration Number	This is automatically populated by the system
Title	Select from drop down list
Surname	Enter the patient's surname
First Name	Enter the patient's first name
Middle Name	Enter middle name if applicable
Alias	Enter Alias if applicable
Previous Surname	
Address 1, 2, 3 and 4	Address 1 and 2 are mandatory fields
Date of Birth	Which is added in the short date format i.e.

	27/05/71? You do not have to put in the dividers
Gender	Select from drop down list
Marital Status	Select from drop down list
Registered HCP (Health Care Professional)	This will have a drop down of all the doctors in the practice. You select the doctor that you wish this patient to register with. Once you enter the doctor their GMS number is automatically populated.
GP GMS Number	Automatically populated when doctor is selected
Patient Type	From this drop down select whether the patient is GMS, Private, Doctor Visit Card, EU etc. This will show on the patient summary screen at all times. If a GMS card is out of date it will display red on the summary screen
GMS Number	Enter GMS number
GMS Expiry Date	Enter GMS expiry date
Distance Code	If the patient is GMS their distance code may be entered here
GMS Dispensing Status	If the surgery is dispensing then this may be ticked to indicate the patient may be dispensed to from the surgery.
PPSN	Enter the PPSN number
Mobile	If you wish to use the SMS facility for recalls within HPM, this must be filled in.
Work	Enter work phone number
Home	Enter home phone number
Fax Number	Enter fax number
Email address	If you wish to use the email facility for recalls within HPM this must be filled in
Consent to:	Because of data protection these boxes must be ticked for the patient to appear on a recall list. PCT – Primary Care Team – If this is ticked it will allow the primary care team access to this patient

	Email – Allows emails to be sent to the patient SMS – Text Messaging
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Validating a GMS Card

Within Patient Registration a GMS card is automatically checked when a number is entered into the GMS number field.

Patient Personal Details

Demographics Additional Family Patient Ids Contacts User Defined Accounts Import Surplus Photo

Registration Number: 156

Title: [dropdown]

Surname: Test

First Name: John

Middle Name: [text]

Alias: [text]

Previous Surname: [text]

Address Line 1: Main Street

Address Line 2: Dublin

Address Line 3: [text]

Address Line 4: [text]

Date of Birth: 09/10/1959 50Y 4M

Gender: Male

Mental Status: [dropdown]

Registered GP: Dr Jenny

GP GMS Number: 1234567

Patient Type: GMS

GMS Number: 8765432A

GMS Expiry Date: [calendar]

Distance Code: [dropdown]

☒ GMS Dispensing Status

PPSN: [text]

Mobile Phone: [text]

Home Phone: [text]

Work Phone: [text]

Fax Number: [text]

Email Address: [text]

Consent To: ☐ PCT ☐ Email ☐ SMS

Checking the Patients GMS Number online...
<https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie>

Merge Ok Cancel

The system will tell you if the GMS card is valid.

Additional

Click on the Additional tab at the top of the patient registration screen. Further information regarding the patient can be entered here. None of these fields are mandatory.

Patient Personal Details

Demographics **Additional** Family Patient Ids Contacts User Defined Accounts Photo

Registration Date: 15/02/2011
Deregistration Date:
Deregistration Reason:
☐ Is Inactive
Date of Death:
Cause of Death:
HCP Normally Sees:
Location:
Previous Address Line 1:
Previous Address Line 2:
Previous Address Line 3:
Previous Address Line 4:
Residential Status:
Mothers Maiden Name:
Smear HCP:
☐ Has Mobility Impairment

Employment Status:
Enrolment Status:
Date of Enrolment:
Religion:
Nationality:
Written Language:
Spoken Language:
Preferred Language
☐ Interpreter Required
Advocacy Needs:
Transport Needs:
Occupation:
☐ Communicate via Head of Family if the patient is in a family group

<https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie>

Merge

The purpose of each field is explained in the table below

Field	Enter
Registration Date	This field is automatically populated when you register the patient but can be edited
Deregistration Date	If a patient leaves the practice the date they left can be entered here
Deregistration Reason	Enter reason for deregistration here
Is Inactive	Tick if patient is inactive
Date of Death	Enter date of death, when this is entered

	Deceased will appear in red on the main health summary screen.
Cause of Death	Enter cause of death
HCP Normally Sees	Enter preferred GP here
Location	If there are multiple locations for a practice enter surgery that patient normally goes to here
Previous Address line 1,2,3 and 4	Enter previous address
Residential Status	Select from drop down list
Mothers Maiden Name	Enter the patient's mother's maiden name. This is used for cervical smear form.
Smear GP	Select from drop down list
Has Mobility Impairment	Tick this box to identify if the patient has a mobility impairment
Employment Status	Select from drop down list
Enrolment Status	Select from drop down list
Date of Enrolment	Enter date
Religion	Select from drop down list
Nationality	Select from drop down list
Written Language	Select from drop down list
Spoken Language	Select from drop down list
Preferred Language	Select from drop down list
Interpreter Required	Tick if interpreter required
Advocacy Needs	Enter text if necessary
Transport	Enter text if necessary

Needs	
Occupation	Select from drop down list
Communicate via head of family if the patient is in a family group	Bills etc. will be addressed to the head of the family.

Family

There are two ways of adding a patient to a family registered on the system.

- Click on the small Add patient icon at the top of the screen
- Click on drop down and select Add to Family
- This will bring up the patient search screen.
- Search for the relevant family member and click OK
- This will open the patient registration screen with the Surname, address, Patient Type and phone number fields populated and will automatically link these two patients

Patient Personal Details

Demographics Additional Family Patient Ids Contacts User Defined Accounts Photo

Registration Number: 190
Title:
Surname: Bloggs
First Name:
Middle Name:
Alias:
Previous Surname:
Address Line 1: 1 Main Street
Address Line 2: Dublin
Address Line 3:
Address Line 4:
Date of Birth:
Gender:
Marital Status:
Registered HCP: Dr Noel Stenson
GP GMS Number:
Patient Type: Private
GMS Number:
GMS Expiry Date:
Distance Code:
☒ GMS Dispensing Status
PPSN:
Mobile Phone:
Home Phone:
Work Phone:
Fax Number:
Email Address:
Consent To: ☐ PCT ☐ Email ☐ SMS

<https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie>

Merge Ok Cancel

The second section also allows you to link people within a family that are registered in the system or to create a new family.

The screenshot shows the 'Patient Personal Details' window with the 'Family' tab selected. The window has a title bar and a menu bar with tabs: Demographics, Additional, Family (selected), Patient Ids, Contacts, User Defined, Accounts, and Photo. The main content area is divided into three sections: 'Family Members', 'Family Note', and 'Family History'. The 'Family Members' section contains a table with columns: Name, Family Position, Address, Is Head, and Dob. Below the table are four buttons: 'Add to a Family', 'Add patients to this Family', 'Change Position for Selected', and 'Mark Selected as Head'. The 'Family Note' section is a text area. The 'Family History' section has a 'Details:' label and a text area, and four checkboxes: 'History Unknown' (checked), 'No Significant Family History', 'Mother Still Alive', and 'Father Still Alive'. Below the checkboxes are two rows of input fields for 'Age at Death' and 'Cause of Death'. At the bottom of the window are two URLs: <https://www.sspcrs.ie/portal/checker/index.jsp> and <http://www.cervicalcheck.ie>, and three buttons: 'Merge', 'Ok', and 'Cancel'.

Name	Family Position	Address	Is Head	Dob
------	-----------------	---------	---------	-----

Buttons: Add to a Family, Add patients to this Family, Change Position for Selected, Mark Selected as Head

Family Note

Family History

☒ History Unknown Details:

☐ No Significant Family History

☐ Mother Still Alive Age at Death Cause of Death

☐ Father Still Alive Age at Death Cause of Death

URLs: <https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie>

Buttons: Merge, Ok, Cancel

If you are registering a patient whose family is already registered on the system

- Click on the Family tab and click on Add Current Patient to a family. This will bring up the patient search screen
- Search for the relevant patient and double click
- This will enter all linked members of that family into the family members screen

Patient Personal Details

Demographics Additional **Family** Patient Ids Contacts User Defined Accounts Photo

Family Members

Name	Family Position	Address	Is Head	Dob
Bloggs, Joe	Parent	1 Main Street, Dublin	<input checked="" type="checkbox"/>	11 May 1966
Bloggs,	Child	1 Main Street, Dublin	<input type="checkbox"/>	

Remove from Family Add patients to this Family Change Position for Selected Mark Selected as Head

Family Note

Family History

☐ History Unknown Details:

☐ No Significant Family History

☐ Mother Still Alive Age at Death Cause of Death

☐ Father Still Alive Age at Death Cause of Death

<https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie> Merge ☒ Ok ☒ Cancel

- Once this is entered you can choose who the head of the family is by highlighting the person and clicking on Mark Selected as Head. (You can also remove a person from a family by clicking on Remove Current Patient from Family)
- Remove From Family – Choose this if the patient is no longer associated with this family group
- Add Patients to Family – Use this option to select more family members to be included in the family
- The patient can be identified as the Parent, Child, son, daughter, mother, father or Unspecified using the change position for selected button.
- Family Note – You can enter notes about the linked family here.
- History Unknown – This box is ticked if the family history of a patient is unknown

- No Significant Family History – This is ticked if there is no significant family history known.

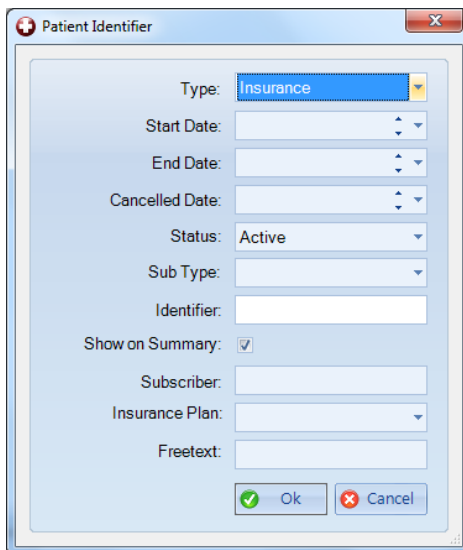
Note: Family medical history on patients that are registered in the system can be accessed from the Medical History Section

Patient ID's

Patient ID's are extra information that you may need registered on the system. For example some of the ID's that are standard on the system are;

- VHI Numbers
- Heartwatch ID's
- MRN
- COOP etc.

To enter an ID click on Add



The screenshot shows a 'Patient Identifier' dialog box with the following fields and controls:

- Type:** A dropdown menu currently showing 'Insurance'.
- Start Date:** A date selection field with up and down arrows.
- End Date:** A date selection field with up and down arrows.
- Cancelled Date:** A date selection field with up and down arrows.
- Status:** A dropdown menu currently showing 'Active'.
- Sub Type:** A dropdown menu.
- Identifier:** A text input field.
- Show on Summary:** A checkbox that is currently checked.
- Subscriber:** A text input field.
- Insurance Plan:** A dropdown menu.
- Freetext:** A text input field.
- Buttons:** 'Ok' (with a green checkmark icon) and 'Cancel' (with a red X icon).

- Use the drop down boxes to select the type
- Enter start and end date
- Enter Status
- Enter a subtype if required e.g. insurance group
- Identifier will usually be a number
- Show on Summary – Tick this option if you want to see this number on the front of the patients summary screen
- Subscriber, Plan and Free text - These options will appear if the type of ID is an insurance number
- Click OK to save

You can Edit or Delete ID's within this area. Multiple entries can be saved within Patient ID's

Contacts

Single or multiple contacts for a patient can be stored in this area.

- To enter a contact click on the Contacts tab at the top.
- Enter contact details

The screenshot shows a 'Patient Contact' window with the following fields and values:

Field	Value
Contact Type	Next of Kin
Date of Birth	
Title	Ms
Surname	Test
Relationship To Patient	Wife
First Name	Mary
Date of Consent	09/09/2008
Address Line 1	New Town
Email Address	
Address Line 2	New Street
Phone Number	045543678
Address Line 3	
Mobile Phone Number	087345689
Address Line 4	
Fax Number	

Buttons: Ok, Cancel

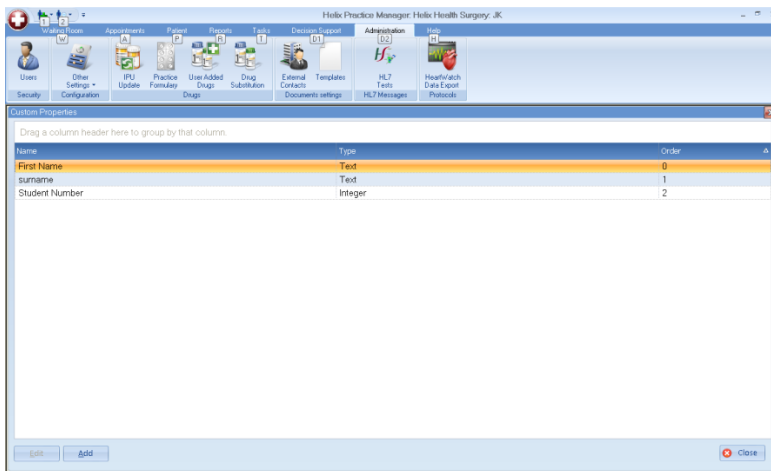
- Click OK to save
- You may also Edit or Delete contacts within this area

User Defined

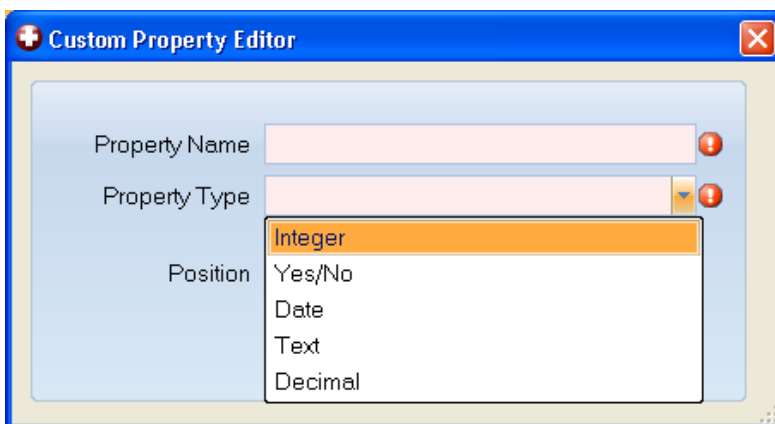
This area is used to insert fields that are not in the system. For example for a college you could enter a student number or if you wanted the system to show number of children etc.

To set up a defined field

- Click on Administration
- Click on Other Settings
- Click on Custom Properties. The following screen will open



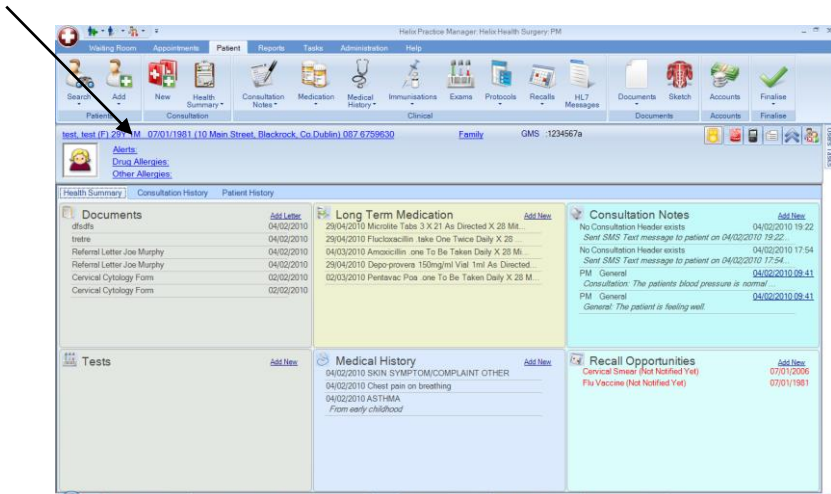
- Click on Add to add a new field
- Property name – Enter name of new field here
- Property Type – there are five options here



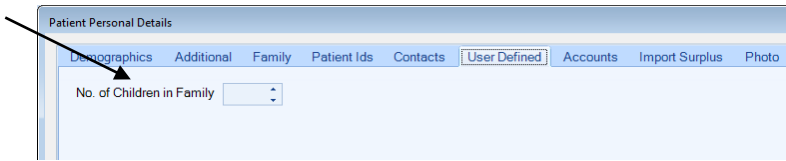
- Integer – This is a whole number
 - Yes/No – will appear as a tick box
 - Date – Will display as a date range
 - Text – Will display as text
 - Decimal – will allow you to enter numeric's with a decimal point
- Position allows you to enter where the field will be placed on the page.

To view the User Defined Fields click back into the patient registration chart.

This can be done by clicking on the patient name at the top of the screen



Click on User Defined. The field you entered should display here:



The screenshot shows a web application window titled "Patient Personal Details". It features a horizontal tab bar with the following tabs: "Demographics", "Additional", "Family", "Patient Ids", "Contacts", "User Defined", "Accounts", "Import Surplus", and "Photo". The "User Defined" tab is currently selected and highlighted. Below the tabs, the "No. of Children in Family" field is visible, which is a text input box with a small downward arrow on its right side. A black arrow from the left points to the "User Defined" tab.

Accounts

From this tab you can decide who pays invoices for this account.

Patient Personal Details

Demographics Additional Family Patient Ids Contacts User Defined Accounts Photo

Billing Arrangement

Default Bill To Use Default from Billing Type

Bad Debtor ☐

Credit Limit No Limit

<https://www.sspcrs.ie/portal/checker/index.jsp> <http://www.cervicalcheck.ie> Merge Ok Cancel

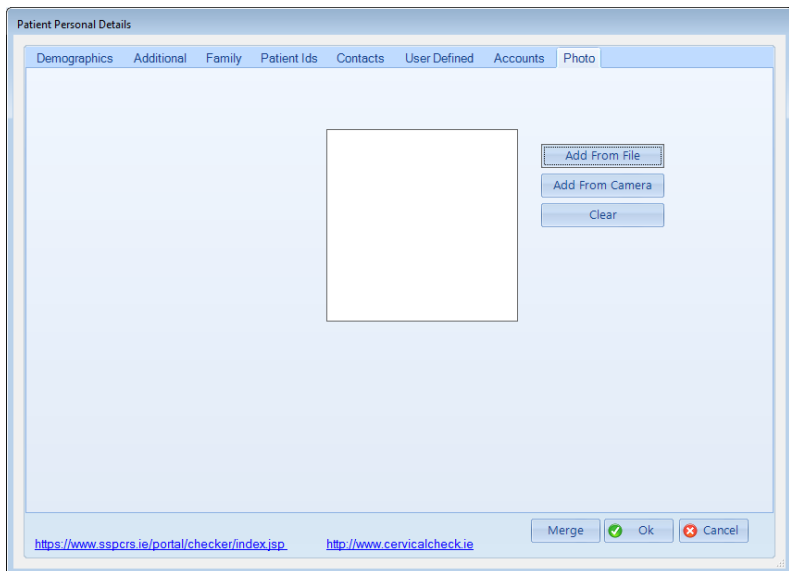
The first option here is Default bill To, this means that every time an invoice is entered in this patient's account, the bill will show as being associated with one of the following:

- Use Default from Billing type – This is the most common option. Whom the bill is associated to depends on the type of bill entered.
- Patient
- Consultant
- Solicitor
- Not Known
- Company
- HCP

You can also mark this patient as being a Bad Debtor and set a limited credit limit for the patient.

Photo

It is possible to add a photo to the patients' health summary rather than just the default male / female icon. You can either add from file (useful if have photographs on computer) or add from camera (webcam). You can also now add from the webcam in the sketch pad area of HPM.

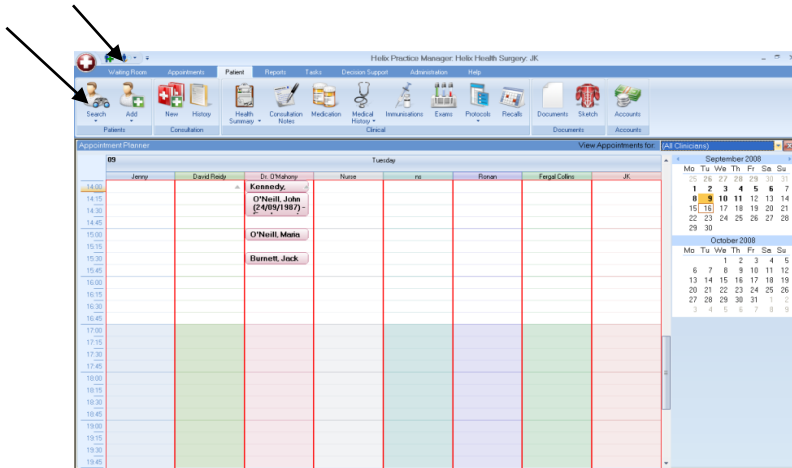


Patient Search Module

There are two areas where you can search for a patient within HPM

Normal Search

- Click on the small search icon at the top which is visible from any screen within HPM.
- Click on Patient from the top ribbon and click on Search



- Once you click on either of these icons the following screen will appear

Patient Search

Search

Surname: First Name: Clear

Date of Birth: GMS Number: Show advanced search

Surname	First Name	Address	Date Of Birth	Age	Reg Num	Type	Phone
---------	------------	---------	---------------	-----	---------	------	-------

Add Edit Ok Cancel

- Within this area you can search by Surname, First Name, Date of Birth and GMS number.

Note: When searching by date of birth, enter the date in the DD/MM/YY format including the divider /. This will automatically place the cursor in the date field.

- Click on Search
- Depending on the data entered this will give you a list of patients with these criteria.

The screenshot shows a 'Patient Search' window with a search bar containing 'blog'. Below the search bar are fields for Surname, First Name, Date of Birth, and GMS Number. A 'Search' button is to the right of the search bar. Below these fields is a table with the following columns: Surname, First Name, Address, Date of Birth, Age, Reg Num, Type, and Phone. The table contains one row of data: Bloggs, Joe, 1 Main Street, Dublin, 11/05/1966, 44 Y 3 M, 153, Private. Below the table are buttons for 'Add', 'Edit', 'OK', and 'Cancel'. A tooltip is visible over the 'Address' column, showing '1 Main Street, Dublin'.

Surname	First Name	Address	Date of Birth	Age	Reg Num	Type	Phone
Bloggs	Joe	1 Main Street, Dublin	11/05/1966	44 Y 3 M	153	Private	

- Double click on the patient to open the patient record.
- You may also add a patient record or edit from this screen

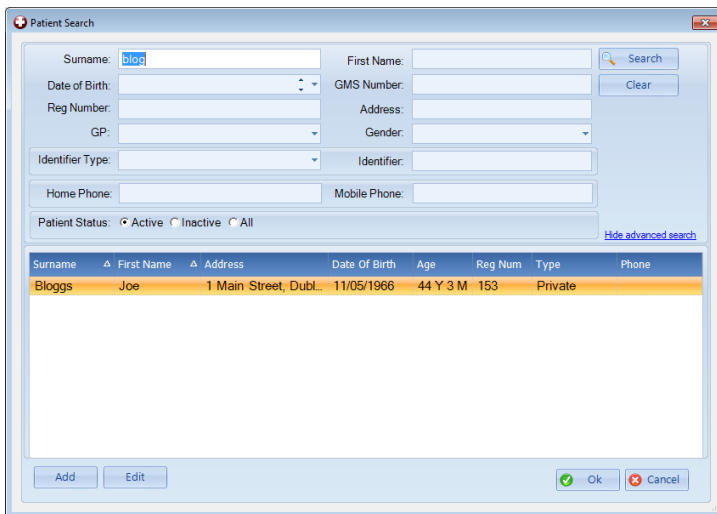
Advanced Search

Advanced search can be used when you need to search by

- Registration Number
- Address
- GP
- Identifier Type and Number
- Gender
- Home/Mobile phone number
- Patient Status

To open Advanced Search, click on 'Show Advanced Search' at the right of the screen.

- The following screen will open;



The screenshot shows a 'Patient Search' window with various input fields for searching patients. The 'Surname' field contains 'Blogg'. Below the input fields is a table of search results.

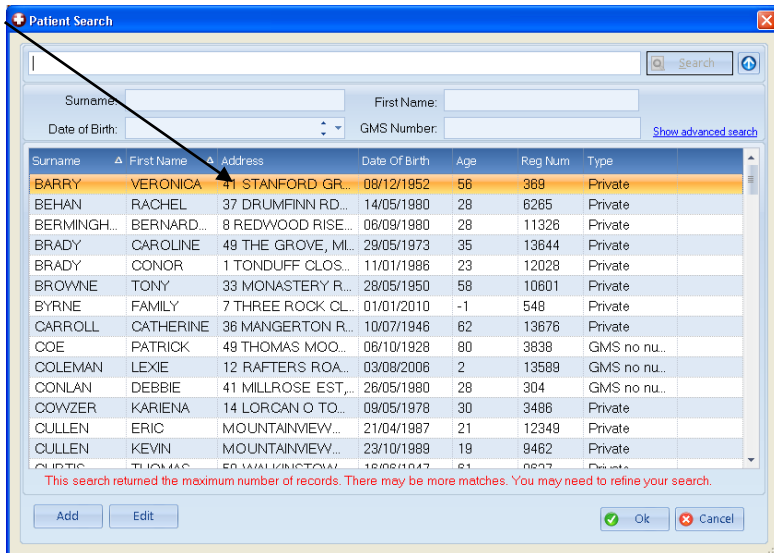
Surname	First Name	Address	Date Of Birth	Age	Reg Num	Type	Phone
Bloggs	Joe	1 Main Street, Dubl...	11/05/1966	44 Y 3 M	153	Private	

At the bottom of the window are buttons for 'Add', 'Edit', 'Ok', and 'Cancel'. A 'Hide advanced search' link is also visible on the right side.

- You can then search by any of the extra criteria
- Double click on the patient to open the patient summary

Refining a Search

If you have a large number of records they can be sorted either alphabetically or numerically by clicking on the field name at the top of the screen.



Merge Patient Facility

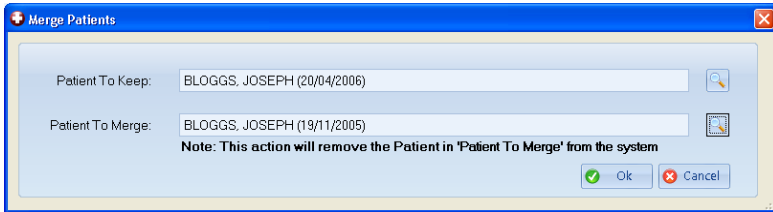
Within HPM there is a facility to merge patients that are entered into the system twice in error.

Please note that once you merge a patient it CANNOT be reversed.

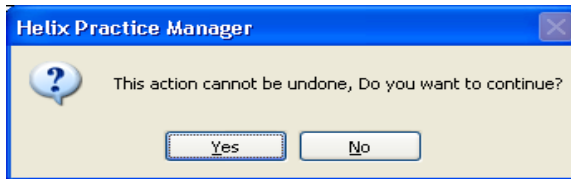
To merge a patient

- Click on Add Patient
- Click on Merge at the bottom of the screen

- Search for the Patient to Keep and double click to enter



- Click on the search icon to bring up the Patient to Merge
- Click OK
- A pop up box will appear asking you if you are sure you want to merge the patient



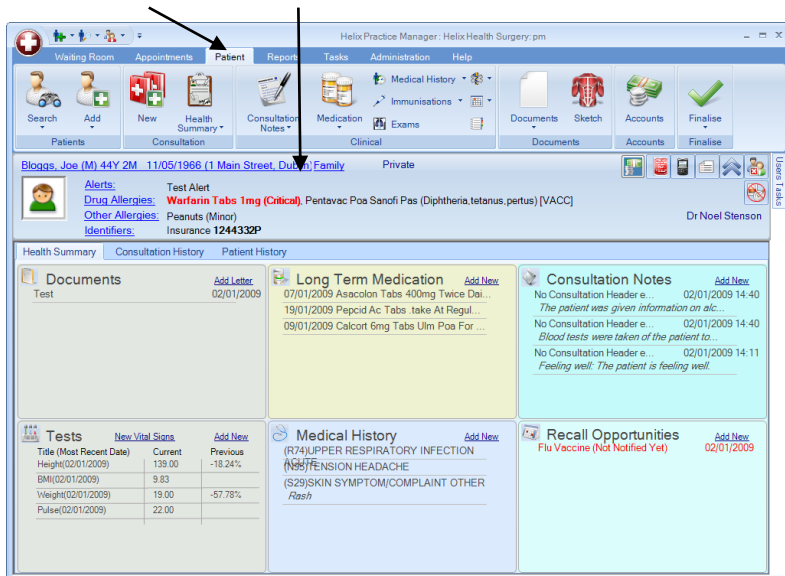
- Click Yes to complete the merge

Patient Health Summary

The Health Summary is the same as the patients file or chart. It is the area where particular patients' details can be viewed and recorded.

View Patient Health Summary

After you search for a patient and click OK, you will then see the patient's health summary.



The Health summary will show you the Patient's general details such as name address and date of birth, and below

that, an overview of the patients chart covering six areas, Documents, Long Term Medication, Consultation notes, Exams, Medical History and Recall Opportunities.

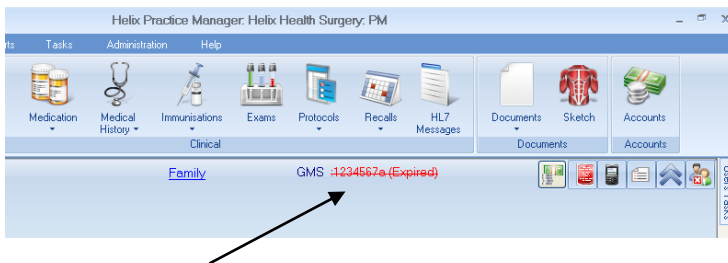


You can return to this screen at any time by clicking the Health Summary button in the ribbon.

Editing Patient Details

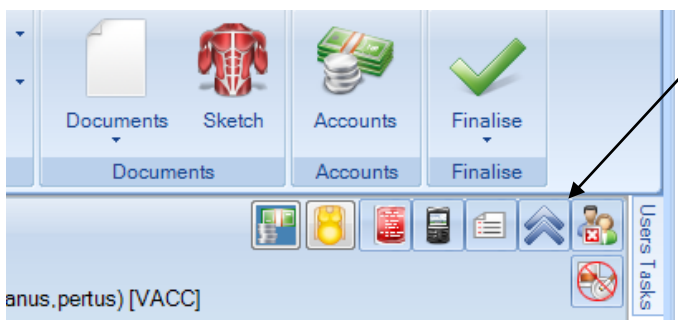
You can edit the patient details from here by clicking on any part of the patient's general details (highlighted and underlined in blue). You can also edit the patient's family details by clicking on the Family link. This will open the family section of the patient registration screen.








The patient's type will appear on the health summary. If a patient GMS card is invalid the number will appear in red with a line through it.





Patient notification icons

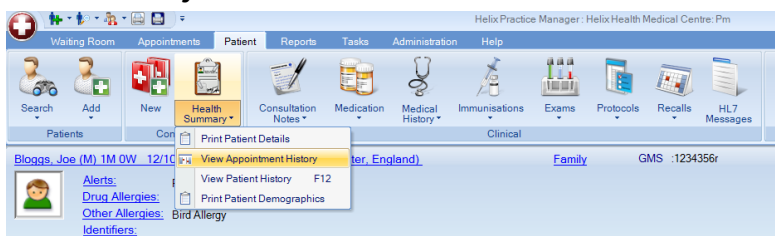
On the right of the patient summary screen are a number of icons:



	New Exam Results	If the patient has new exam results present this icon will appear. This will indicate that there are exams in the patient's file that are 'For Review' or 'For Notification'.
	Patient Owing Money	If the patient has a personal outstanding amount that is owing in their account then this icon will be displayed. If you hover your mouse over the icon, their outstanding balance will be displayed.
	Pregnant Patient	This icon will appear if the patient is currently pregnant. If you hover the mouse over the icon you will see the EDD date.
	Print Lab Label	You can print labels designed specifically for blood bottles or forms. You can choose the doctors name to appear on the label. And the lab number to use for the patient.
	Patient SMS	If you click on Send SMS, you will be able to send an SMS to this patient.
	Patient Label	If you click the 'Create Label' icon you will be able to print out a label or multiple labels for the patient.
	Minimise Summary Bar	If you click this icon, the patient summary bar will minimise into one line so that the alerts and allergies are hidden. Click the

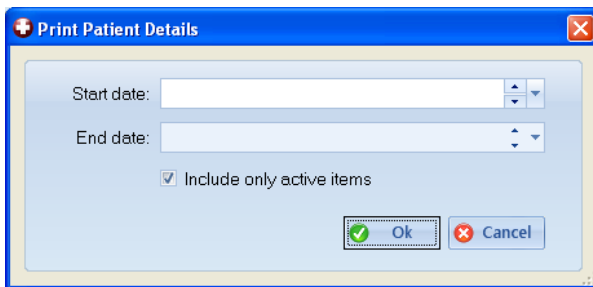
		same button again to restore it.
	Close Patient File	Clicking this icon will close your current patients file and return you to the waiting room.
	Show Smoking/ Alcohol intake	This icon indicates whether or not the patient smokes or drinks alcohol and how many units/cigarettes were recorded based on the last Vital Signs test taken. The icon will change accordingly. Click on the icon to view the last vital signs results or hold your mouse over the icon to view a summary.

Health Summary



Print Patient Details

You can print these details by clicking on the drop down menu below this button and selecting the option to Print Patient Details. You will be asked to enter in a start date and an end date, meaning you can print off patient records for any particular time period.

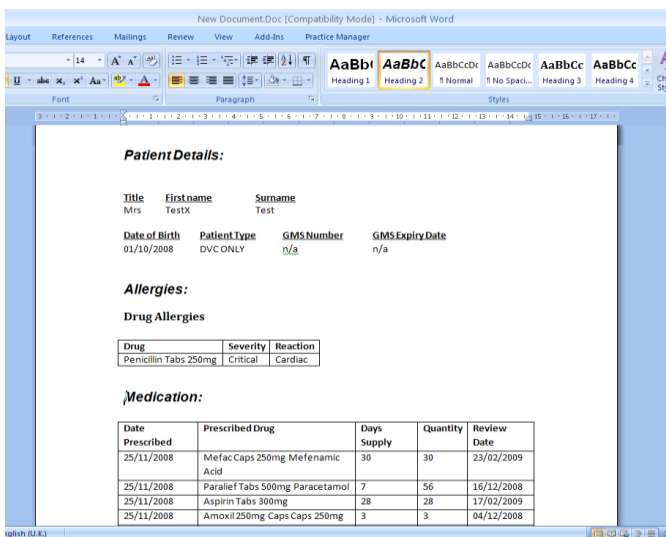


Print Patient Details

Start date:

End date:

☒ Include only active items



New Document.Doc [Compatibility Mode] - Microsoft Word

Layout References Mailings Review View Add-Ins Practice Manager

Font Paragraph Styles

PatientDetails:

Title	Firstname	Surname
Mrs	TestX	Test

Date of Birth	PatientType	GMS Number	GMS Expiry Date
01/10/2008	DVC ONLY	n/a	n/a

Allergies:

Drug Allergies

Drug	Severity	Reaction
Penicillin Tabs 250mg	Critical	Cardiac

Medication:

Date Prescribed	Prescribed Drug	Days Supply	Quantity	Review Date
25/11/2008	Mefac Caps 250mg Mefenamic Acid	30	30	23/02/2009
25/11/2008	Paralief Tabs 500mg Paracetamol	7	56	16/12/2008
25/11/2008	Aspirin Tabs 300mg	28	28	17/02/2009
25/11/2008	Amoxil 250mg Caps Caps 250mg	3	3	04/12/2008

View patient Appointment history

In the same section as above, there is also an option to view the patient's appointment history. Click on this option to see the total number of appointments for the patients, including the total number of DNA appointments and cancelled appointments.

Appointment History						
Scheduled Date	Type	State	Clinician	Location	Notes	
13/07/2010 18:30	Consultation	Cancelled	Dr. O'Mahony	Helix Health Surgery		
13/07/2010 18:00	Consultation	Cancelled	Jenny	Helix Health Surgery		
13/07/2010 17:45	Consultation	Dna	Dr. O'Mahony	Nursing home		
13/07/2010 17:15	Consultation	Dna	Dr. O'Mahony	Nursing home		
15/06/2010 13:00	6 Week Check-up	Active	David Reidy	Helix Health Surgery		
15/06/2010 12:10	Consultation	Active	Dr. O'Mahony	Helix Health Surgery		
13/05/2010 11:45	Consultation	Active	Nurse	Helix Health Surgery		
13/05/2010 09:30	Consultation	Active	Jenny	Helix Health Surgery		
12/05/2010 16:15	6 Week Check-up	Active	Jenny	Helix Health Surgery		
28/04/2010 11:15	Consultation	Active	Nurse	Helix Health Surgery		
Total number of appointments:		11	Total in last year:	11		
Total number of DNA appointments:		2	DNA in last year:	2		
Total number of cancelled appointments:		2	Cancelled in last year:	2		

View Patient History F12

By selecting View Patient History (F12) the user will be able to view and print the patient's history. The user can select which areas on the patients file they wish to print and can also print the patient's history for a specific date range.

Patient History for Joe Bloggs

Patient History

Text View | List View

Show: ☐ Show InActive

☒ Consultations ☒ Long Term Medications ☒ Conditions ☒ Exams

☒ Consultation Notes ☒ Acute Medications ☒ Immunisations ☒ Documents ☒ Protocols

From: To:

Patient Details

Patient Name: Joe Bloggs
Address: Manchester City, Manchester, England
Phone Number:
Date of Birth: 12/10/2010

Thursday 18 November 2010

Consultation
Done By: PM Type: General At Location: Helix Health Medical Centre

Exams
Cholesterol (Awaiting) Num Tests: 1
Cholesterol (Completed) Num Tests: 1, Num Abnormal: 1

Wednesday 17 November 2010

Exams
Vital Signs (Completed) Num Tests: 5

Tuesday 16 November 2010

Consultation
Done By: PM Type: General At Location: Helix Health Medical Centre

Wednesday 10 November 2010

Consultation

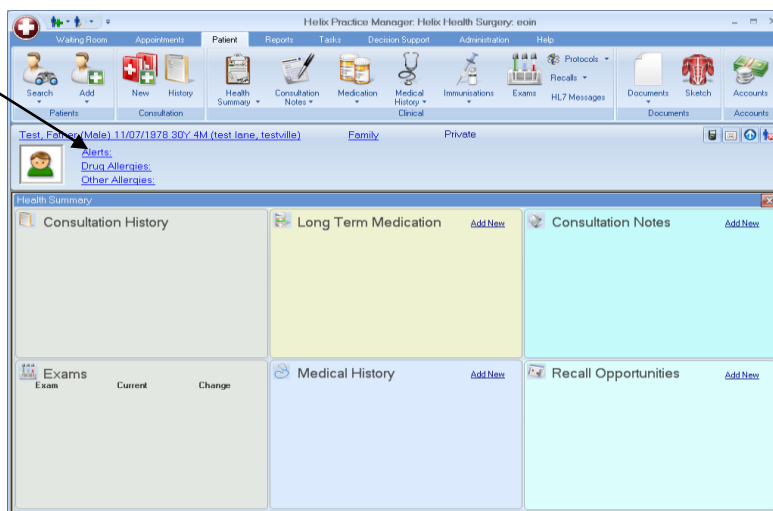
Print

Print Patient Demographics

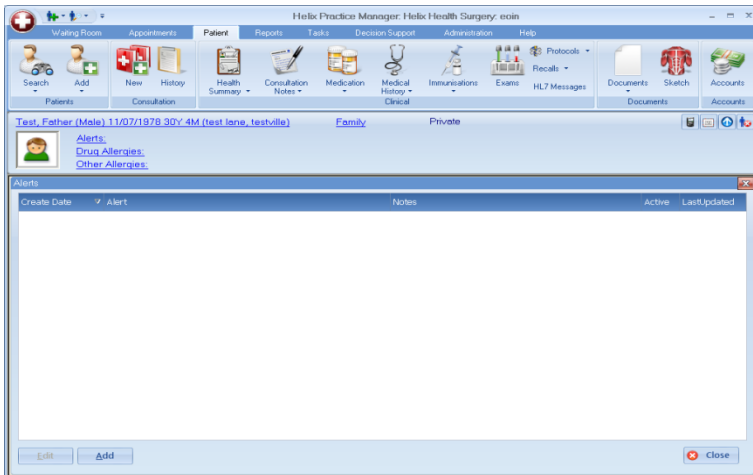
The will print the patients demographics and the template can be configured in Templates if you want to change what information prints on this.

Patient Alerts

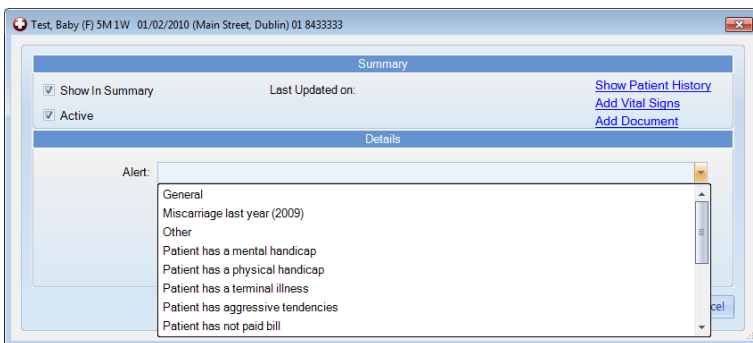
To open patient alerts select Alerts while in the patients file.



This will open the Alerts page and you now can Edit or Add a new alert for the patient.



To add a new alert select the Add button. This will open up the following screen.



Here you can select from the drop down menu. There are a number of alerts on the drop down menu which you can just select.

If you cannot find the alert you are looking for on the list .You can also choose **Other** or **General**. This will allow you

to type in the particular alert you wish to add for the patient.

The screenshot shows a software window titled "Test, Baby (F) 5M 1W 01/02/2010 (Main Street, Dublin) 01 8433333". The window is divided into two main sections: "Summary" and "Details".

Summary Section:

- There are two checkboxes: "Show In Summary" and "Active", both of which are checked.
- To the right of these checkboxes is the text "Last Updated on:".
- On the far right of the Summary section are three hyperlinks: "Show Patient History", "Add Vital Signs", and "Add Document".

Details Section:

- There is a label "Alert:" followed by a dropdown menu that currently displays "Patient has aggressive tendencies".
- Below the dropdown menu is a checkbox labeled "Critical", which is checked.

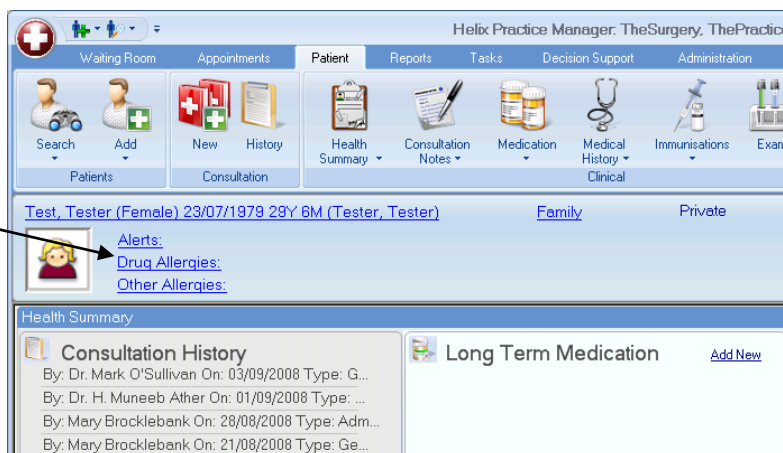
At the bottom right of the window are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon).

You can choose whether the alert is critical or not, if it is ticked as critical then it will show up in red on the patient summary screen.

You are also given the option to show the alert in the patient summary. This will show the alert on the front screen and also on making an appointment for the patient.

Drug Allergies

Like Alerts you can simply add a Drug Allergy to a patients file. Open the patients file and click on Drug Allergies.



On the Drug Allergies screen, you will see a list of any previously added allergies. To add a new allergy click ADD.

On the next screen, type in the name of the drug the patient is allergic to. This drug field is a drop down list with the IPU list of drugs.

The screenshot shows a software window titled "Test, Baby (F) 5M1W 01/02/2010 (Main Street, Dublin) 01 8433333". The window has a "Summary" tab and a "Details" tab. In the "Summary" tab, there are two checkboxes: "Show In Summary" (checked) and "Active" (checked). To the right of these checkboxes is the text "Last Updated on:". To the right of the "Summary" tab are three links: "Show Patient History", "Add Vital Signs", and "Add Document". The "Details" tab is active and contains three fields: "Drug:" with a text input field and a magnifying glass icon, "Reaction:" with a dropdown menu, and "Severity:" with a dropdown menu. At the bottom right of the window are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon).

You must add a drug name and a reaction. There is a standard list of reactions in this drop down list, however if there is another reaction that is not in the list, you can add more from the administration section (see chapter on Administration for details).

There is also an option to record the severity of the reaction, either critical or minor. If the allergy is recorded as critical, it will appear in red on the patient Health Summary screen.

Other Allergies

You can also add other allergies. These are anything the patient is allergic to that is not a drug.

Open the patient file and click on Other Allergies. On the next screen, click Add to record a new allergy. The first field is a drop down list of allergies, peanuts, dust, etc. If there is an option that is missing from this list you can free text in an allergy in the other allergy line

Waiting Room, Appointments and Browser.

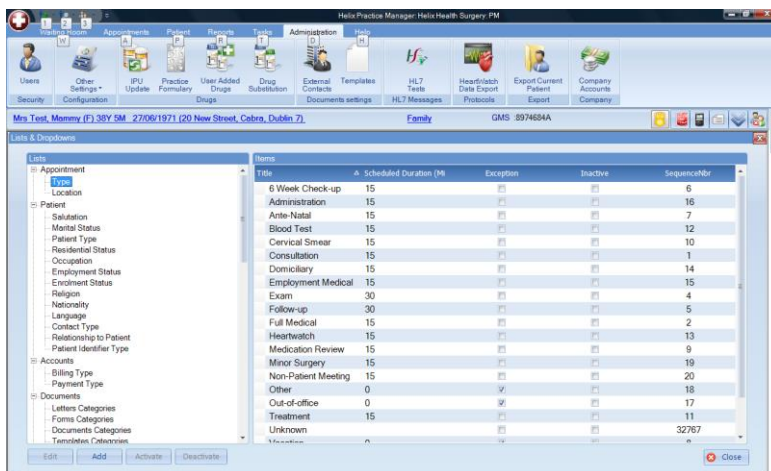
Once you have successfully signed in to HPM it will automatically bring you to the waiting room, from which you also access the appointments and browser. The waiting room and appointments modules provide you with a valuable tool to organise and manage the day to day appointments in your practice. The waiting room, planner and browser can be accessed simultaneously by a variety of users logged onto the network. The list of patients waiting is refreshed and updated across the network constantly.

Please note that in order for this module to work effectively you will need to set up the relevant users and working schedules within the system.

Appointments

Setting up Appointment Types

On the top toolbar click on Administration then Other Settings then Lists and Drop Downs. Within this list you will see Appointments then Type and Location. Click on Type, the following screen will appear

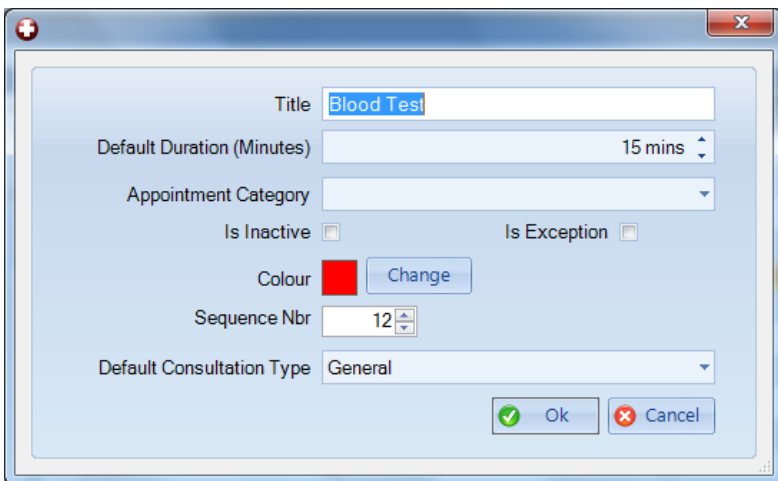


From this screen you can add new appointment types or edit existing ones.

To add a new appointment type click on ADD and fill in the following:

- Type in the title of the type of appointment
- Enter the default duration for new appointment type
- Appointment Category – You can categorise your appointments if needed.
- Is Exception – Tick this box if the appointment type is for exceptions (e.g. Out of office / holidays)

- Is Inactive – Tick this to deactivate an appointment type
- Colour – Click here to change the colour of the appointment type as it appears in the planner
- You can also enter a sequence number which will determine where the appointment will be when you open the list.
- Default Consultation type – This option allows you to specify the type of consultation that is associated with the appointment. i.e. when the consultation is started, it will be recorded automatically as this type of consultation.
- Click OK to save, this is now added to the list.



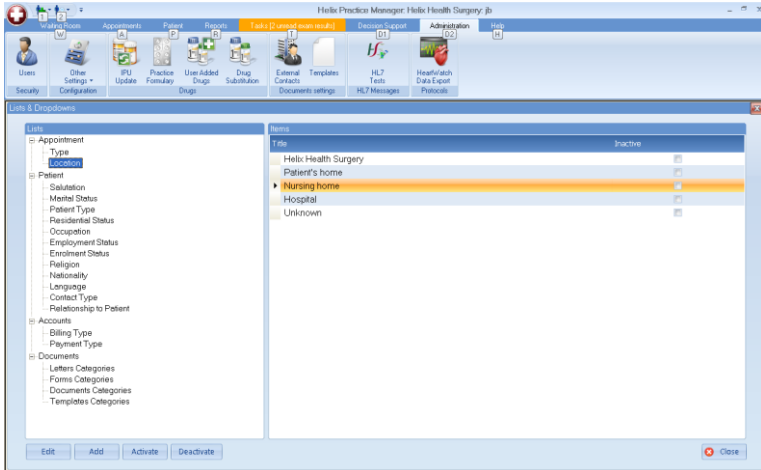
The screenshot shows a dialog box for configuring an appointment type. It has a title bar with a red cross icon on the left and a close button (X) on the right. The main area contains the following fields and controls:

- Title:** A text box containing "Blood Test".
- Default Duration (Minutes):** A spinner box set to "15 mins".
- Appointment Category:** A dropdown menu.
- Is Inactive:** An unchecked checkbox.
- Is Exception:** An unchecked checkbox.
- Colour:** A red color swatch next to a "Change" button.
- Sequence Nbr:** A spinner box set to "12".
- Default Consultation Type:** A dropdown menu set to "General".
- Buttons:** "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon) buttons at the bottom right.

- To Edit an existing Appointment Type highlight Type
- Click on Edit
- You can now change the text or duration of the appointment

- Click OK to save

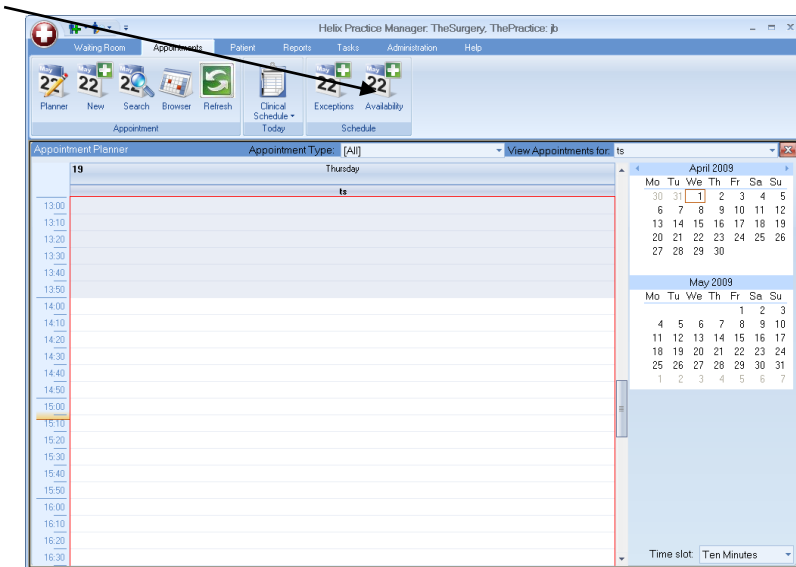
Also within this area you have a tab called Location.



You may add or edit locations depending on the appointment type. These can also be deactivated or activated according to practice needs.

Setting Resource Availability

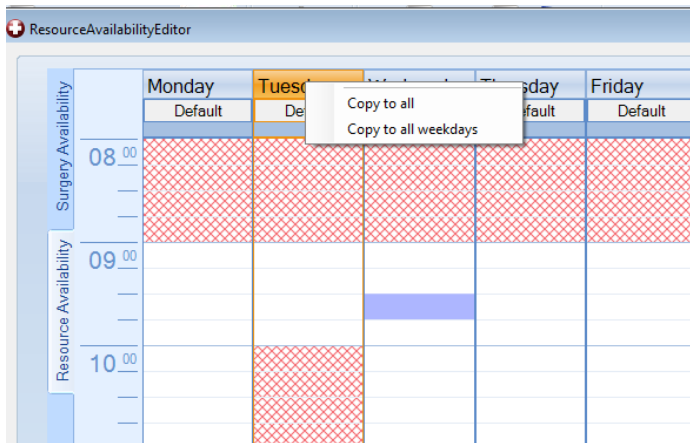
To set up resource availability click on Appointments at the top of the screen. Then click on Availability within the appointments screen.



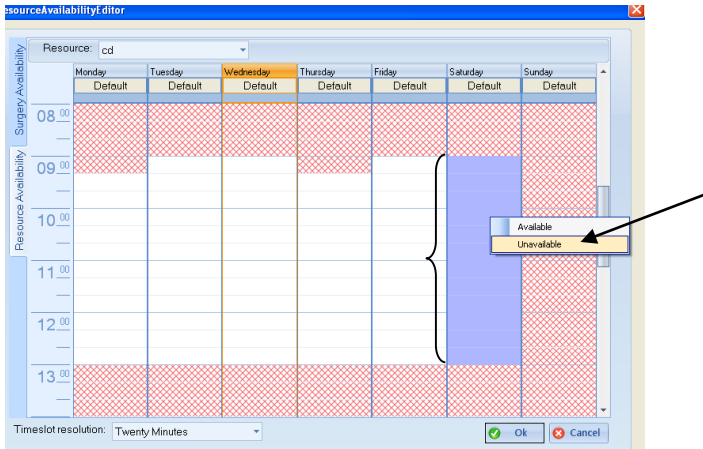
This area will show the Resource Availability. You will see a weekly schedule with the available times for each day. You can break the schedule down into different time slots. You can view each day in 5, 10, 15, 20 or 60 minute slots for example. You can also specify the location of the appointment schedule, for multiple surgery locations.

To set Resource availability, select the clinician from the drop down list to display the times that this person is available each week. You can also choose the location here to set times for different surgery locations.

Once you have set the times for one day, you can copy this format to be the same for the rest of the week, or the rest of the weekdays. To do this, right click on the day e.g. Monday, and select Copy to all weekdays, or Copy to all.

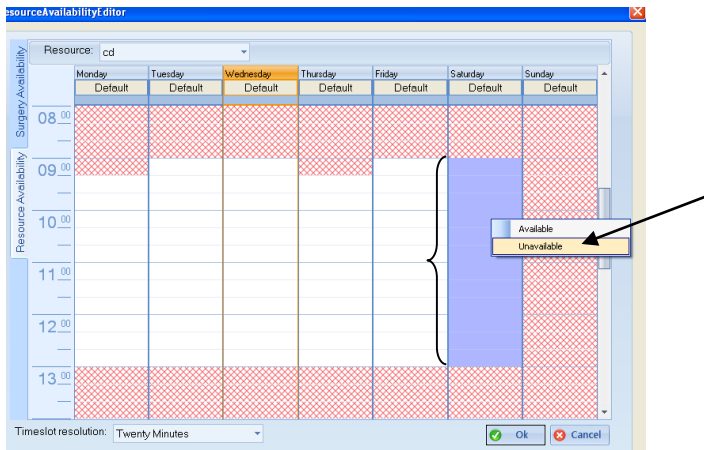


To select multiple time slots, click and drag your mouse along the required time slots so they are all highlighted in blue, then right click and choose available or unavailable depending on which option you require.



When you look at the planner, the times you have set as unavailable will appear grey to show unavailable times.

To mark a time slot as unavailable right click on the time slot and select Unavailable. The time slot will change in colour to indicate this. To make it available, right click on the slot again and choose Available.

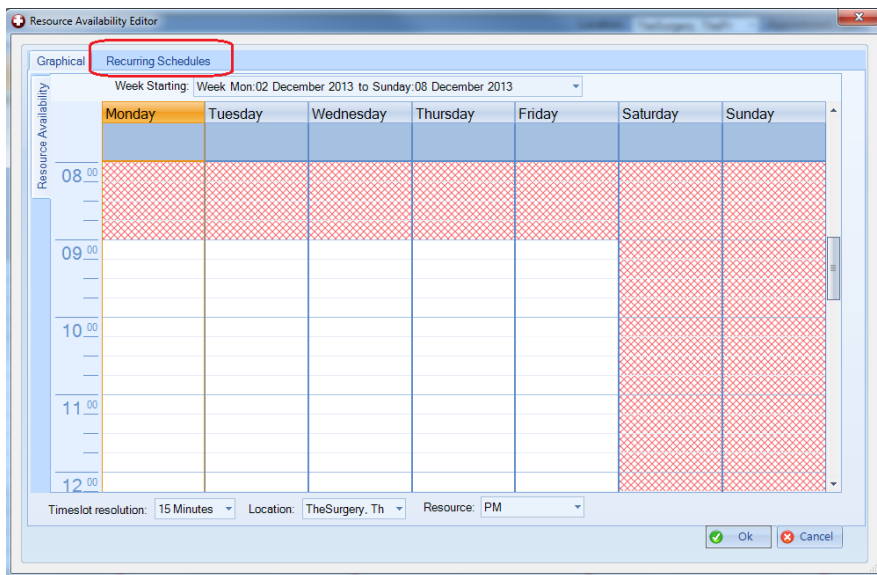


Once you have done this for each clinician click OK to save.

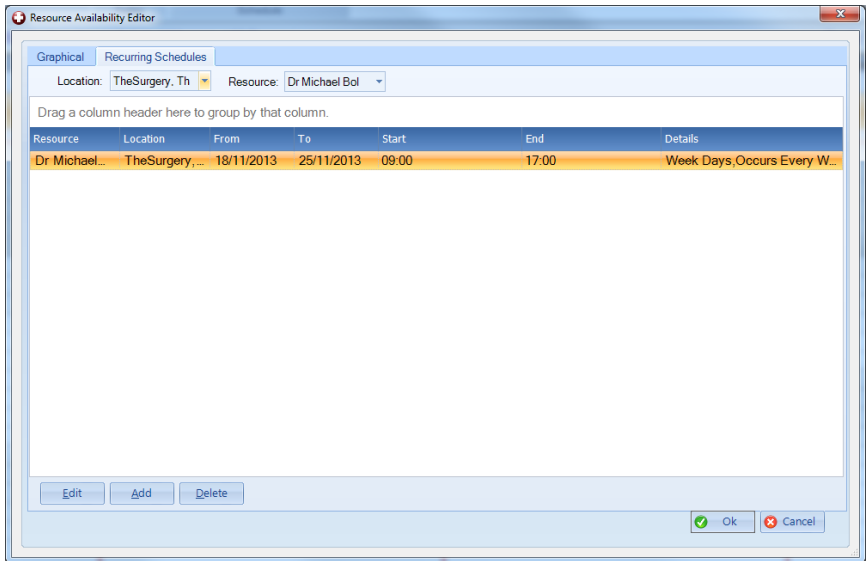
By setting up the availability you can ensure that appointments are not made in error by scheduling attendees when a resource is not available.

Recurring Availability

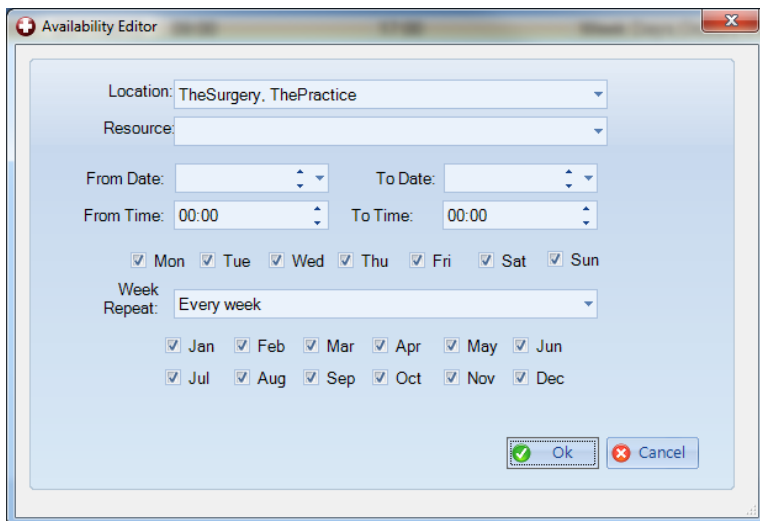
A new feature for recurring availability has been added. This allows the user to configure different availability, for different users, on an ongoing basis. To do this, the user can select availability from the appointments tab. They will get the screenshot below, which will display the normal graphical window (which will function as normal), with an additional recurring schedules tab, see below



After clicking on this, the user will see a screen where they can select the location, resource, and add a recurring schedule for the user. They can also view or edit any previously saved recurring schedules. Remember to select the resource and location when looking at their view.



To add a recurring schedule, the user can simply click on add. From this screen, they can add in the location, resource and time and date parameters as needed, see below



The screenshot shows a software window titled "Availability Editor". It contains several input fields and checkboxes for configuring appointment availability. The "Location" dropdown is set to "TheSurgery, ThePractice". The "Resource" dropdown is empty. The "From Date" and "To Date" fields are empty, as are the "From Time" and "To Time" fields, which are currently set to "00:00". Below these, there are checkboxes for each day of the week, all of which are checked: Mon, Tue, Wed, Thu, Fri, Sat, and Sun. A "Week Repeat:" dropdown is set to "Every week". At the bottom, there are checkboxes for each month of the year, all of which are checked: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, and Dec. In the bottom right corner, there are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon).

There are various permutations that can be selected here around date range, time and days of the week. You can also select at what point in the month the appointment appears (when selecting a date range over a month), see screen shot below

Availability Editor

Location: TheSurgery, ThePractice

Resource: PM

From Date: 20/11/2013 To Date: 20/02/2014

From Time: 00:00 To Time: 00:00

☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Week Repeat: Every week

- Every week
- Occurs in first 7 days of the month
- Occurs between day 8 and 14
- Occurs between day 15 and 21
- Occurs between day 22 and 28
- Occurs between day 29 and 31
- Last 7 days of month

Cancel

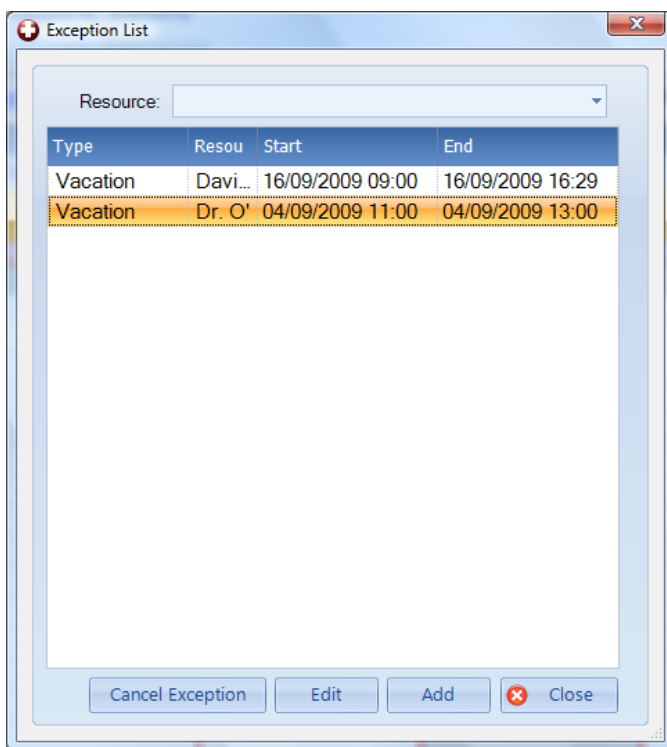
From here, the user can select whereabouts in the month they would like the recurring availability to appear. They would either use every week if the recurring range is less than one month, or any of the other permutations above it the range is over more than one month.

Please note that any graphical availability that was previously set will stay the same i.e. If you create a recurring availability for a week of mornings, but the afternoons were set as available in graphical view, they will still be available. **If the user wants to use the recurring availability in its entirety, it would probably be best to mark them as totally unavailable in the graphical view and set up their full availability from scratch.**

Exceptions

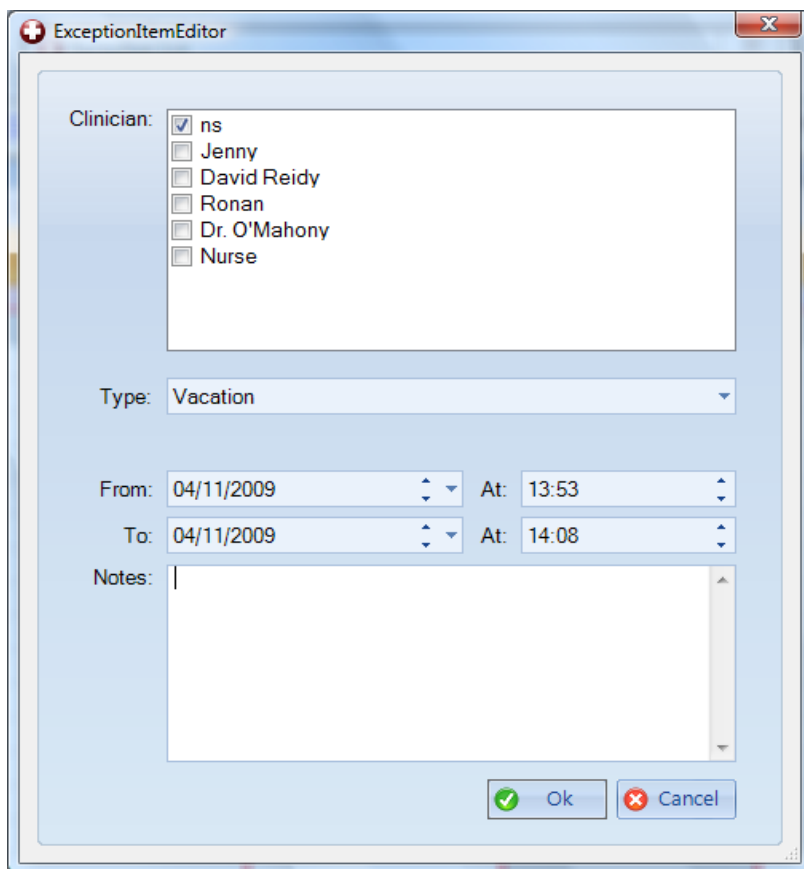
If a clinician or group of clinicians has a meeting out of the surgery or is taking holidays you can use the Exceptions button to enter these dates and times. This ensures that appointments are not made in error for these clinicians.

To do this, click on Exceptions on the toolbar. The following screen will appear:



The screenshot shows a window titled "Exception List" with a close button (X) in the top right corner. Inside the window, there is a "Resource:" dropdown menu. Below it is a table with four columns: "Type", "Resou", "Start", and "End". The table contains two rows of data. The first row shows "Vacation" for "Davi..." from "16/09/2009 09:00" to "16/09/2009 16:29". The second row, which is highlighted in orange, shows "Vacation" for "Dr. O'" from "04/09/2009 11:00" to "04/09/2009 13:00". At the bottom of the window, there are four buttons: "Cancel Exception", "Edit", "Add", and "Close" (with a red X icon).

Type	Resou	Start	End
Vacation	Davi...	16/09/2009 09:00	16/09/2009 16:29
Vacation	Dr. O'	04/09/2009 11:00	04/09/2009 13:00



The screenshot shows a Windows-style dialog box titled "ExceptionItemEditor". It contains the following fields and controls:

- Clinician:** A list box with a checked item "ns" and other items "Jenny", "David Reidy", "Ronan", "Dr. O'Mahony", and "Nurse".
- Type:** A dropdown menu currently showing "Vacation".
- From:** A date/time picker showing "04/11/2009".
- At:** A time picker showing "13:53".
- To:** A date/time picker showing "04/11/2009".
- At:** A time picker showing "14:08".
- Notes:** A large text area for entering notes.
- Buttons:** "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon) buttons at the bottom right.

You can see a list of existing exceptions by selecting a resource from the drop down list.

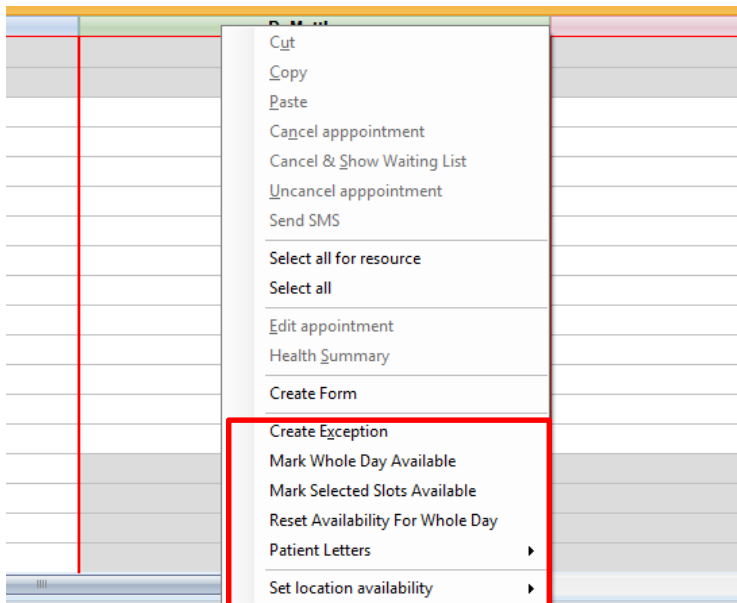
To add a new exception:

- Click Add. You can select more than one clinician at a time
- Select Type – vacation, out of office or other

- Enter the dates and times
- Enter any notes if required
- Click OK to save

Right Click Availability options

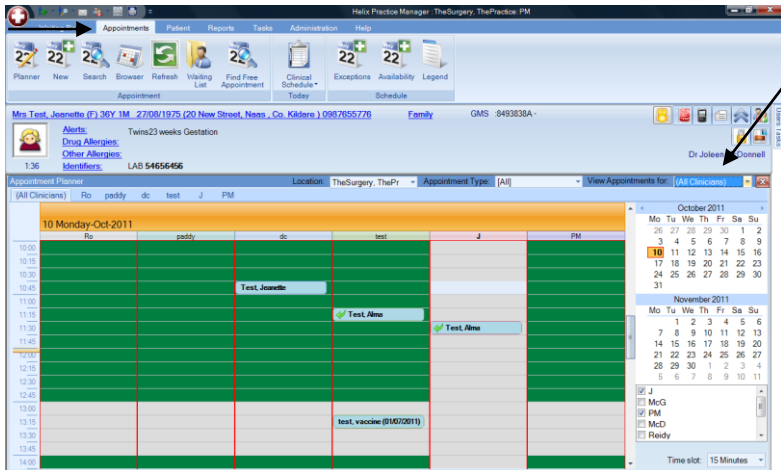
From the planner, there are a number of options for setting availability when you right click on any of the time slots for a clinician.



- **Create Exception** – This allows you to create an exception for the clinician. The date and time of the exception will be automatically entered as the date and time of the time slot that was clicked on.
- **Mark Whole day as available** – Select this option to set all slots for the day as available.
- **Mark Selected slots as Available** – Use your mouse to click and drag and highlight a number of time slots, then select this option to mark those slots as available.
- **Reset availability For Whole Day** – Use this option to set the availability back to the default for that clinician.
- **Set Location Availability** - Use this option to change the location availability for the clinician.

Creating Appointments

Click on Appointments on the top toolbar. Appointments can be viewed by Clinician or by All Clinicians. To select the view you want use the drop down to the right of the screen or click on the relevant Tab for the clinician.



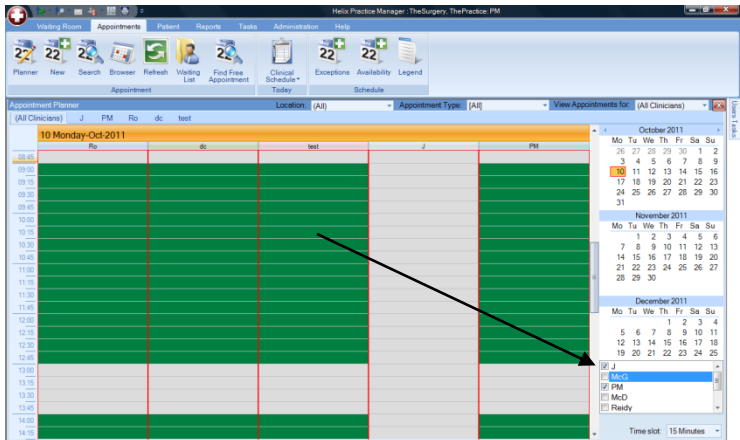
You can move dates by using the calendar at the right of the screen. To view a date, simply click on that date.

Today's date will always have a red line around it.

Days with appointments will be bold

To move onto the next month click on the arrows either side of the current month.

There is also a HCP selector on the appointments page.. When you check users they will appear on the planner for that day and if you uncheck them they will not appear on the planner.



Note: you cannot have HCP checked / unchecked for each different day, i.e. If you uncheck a user on Monday it will be unchecked for other days of the week too.

Entering Appointment Details

Details of the new appointment can be entered as follows:

- Double click in the time and clinician required, or clicks on New Appointment from the icons at the top of the diary.

Appointment Details

Patient Appointment History

Patients Other

Attendee: Bloggs, Joe 11/05/1966

GMS Details: n/a GMS Expiry Date: Not Available

Date: 03/08/2010 At: 11:00

Type: Consultation

Duration: 15 mins

Registered to:

Clinician: ☐ Dr. O'Mahony ☐ David Reidy ☐ Jenny ☒ Nurse

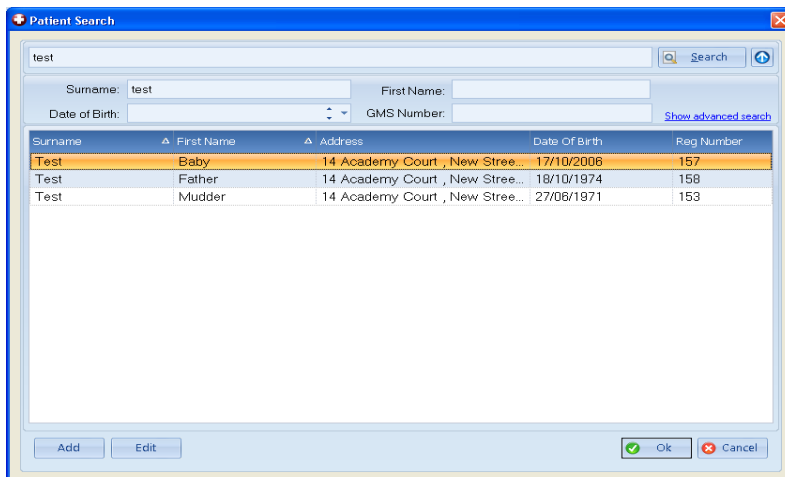
Location: Helix Health Surgery

Notes:

Alerts: Test Alert

Ok Cancel

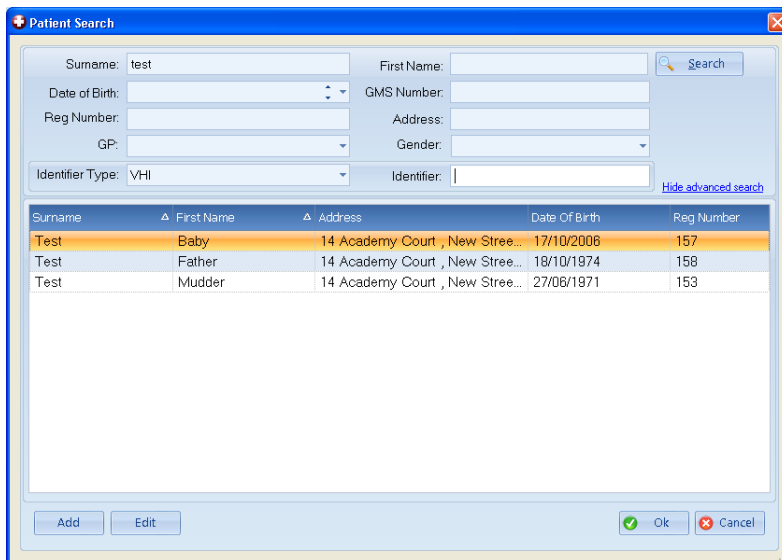
- **Attendee:** When the screen above appears type in the name of the Attendee if you have the name. If you wish to search by date of birth or other criteria click on the search icon beside the Attendee name. If you have a patient file open this patients name will automatically appear in the attendee box. If you do not wish to make an appointment for this patient then remove the name and search as above.



The screenshot shows a 'Patient Search' window with a search bar at the top containing the text 'test'. Below the search bar are input fields for 'Surname: test', 'First Name:', 'Date of Birth:', and 'GMS Number:'. A 'Search' button is located to the right of the search bar. Below the input fields is a table with the following columns: Surname, First Name, Address, Date Of Birth, and Reg Number. The table contains three rows of data. The first row is highlighted in orange. Below the table are 'Add' and 'Edit' buttons. At the bottom right are 'Ok' and 'Cancel' buttons. A link 'Show advanced search' is located to the right of the 'GMS Number' field.

Surname	First Name	Address	Date Of Birth	Reg Number
Test	Baby	14 Academy Court , New Stree...	17/10/2006	157
Test	Father	14 Academy Court , New Stree...	18/10/1974	158
Test	Mudder	14 Academy Court , New Stree...	27/06/1971	153

- From this screen you can search by surname, first name, DOB and GMS number
- To search by address, registration number, GP, gender, identifier or identifier type click on Show Advanced Search



The Patient Search dialog box contains search criteria fields and a results table.

Search Criteria:

- Surname: test
- First Name:
- Date of Birth:
- GMS Number:
- Reg Number:
- Address:
- GP:
- Gender:
- Identifier Type: VHI
- Identifier:

[Hide advanced search](#)

Surname	First Name	Address	Date Of Birth	Reg Number
Test	Baby	14 Academy Court , New Stree...	17/10/2006	157
Test	Father	14 Academy Court , New Stree...	18/10/1974	158
Test	Mudder	14 Academy Court , New Stree...	27/06/1971	153

Buttons: Add, Edit, Ok, Cancel

- Once you have found the patient highlight them and click OK
- Date and Time the date and time field is automatically populated if you have clicked directly on the diary, you may need to fill in the time if you have clicked New from the toolbar.
- Type this defaults to Consultation. To change this simple use the drop down to select consultation type.

Appointment Details

Appointment Details Patient Appointment History

Patients Other

Attendee: Bloggs, Joe 11/05/1966

GMS Details: n/a GMS Expiry Date: Not Available

Date: 03/08/2010 At: 11:00

Type: Consultation

Duration: Consultation

Registered to: Full Medical
Vaccination

Clinician: Exam
Follow-up
6 Week Check-up
Ante-Natal
Medication Review

Location: Home Surgery

Notes:

Alerts: Test Alert

Ok Cancel

- Duration Enter the expected duration of appointment if different to the default.
- Clinician This is the clinician that the attendee will be seeing for this consultation. You can choose more than one clinician here by ticking the box beside them.
- Notes Additional notes may be typed in here
- GMS Validation – If this is a GMS patient the system will automatically check the GMS number
- Alerts – If the patient has alerts registered on the system these will show at the bottom of the screen

- Accounts – If there is money outstanding on the account there will be a flashing icon on the right of the screen

The screenshot shows the 'Appointment Details' window with the following fields and values:

- Appointment Details** (tab selected) | **Patient Appointment History** (tab)
- Patients** | **Other** (tabs)
- Attendee:** test, Amy 03/01/1983
- GMS Details:** GMS Number: (1234567a) **Checking the GMS Number online...**
- Date:** 03/08/2010 | **At:** 11:00
- Type:** Consultation
- Duration:** 15 mins
- Registered to:**
- Clinician:** Nurse
- Location:** Helix Health Surgery
- Notes:**
- Alerts:** **Patient has aggressive tendencies.** Patient has not paid bill

A red box highlights the alert text: "Patient has aggressive tendencies, Patient has not paid bill".

NB If a patient is seeing more than one clinician that day e.g. the doctor and the nurse the appointments will be linked by a green arrow

Adding an unregistered attendee to Appointments

From time to time you may need to add an unregistered patient or medical rep to the appointments

- Double click on the appointment time or New as normal
- On the Appointment Details click on Other

The screenshot shows the 'Appointment Details' dialog box. The 'Patient Appointment History' tab is active, and the 'Other' sub-tab is selected. The 'Attendee' field is populated with 'Rep - Pfizer (Anne)'. The 'GMS Details' field shows 'n/a' and the 'GMS Expiry Date' is 'Not Available'. The 'Date' is set to '03/08/2010' and the time 'At' is '15:15'. The 'Type' dropdown menu is open, showing 'Non-Patient Meeting' as the selected option. The 'Duration' is set to '15 mins'. The 'Registered to:' field is empty. The 'Clinician' list includes 'Dr. O'Mahony', 'David Reidy', 'Jenny', and 'Nurse', with 'Nurse' checked. The 'Location' is 'Helix Health Surgery'. The 'Notes' and 'Alerts' fields are empty. The 'Ok' and 'Cancel' buttons are at the bottom right.

- Fill in the attendee name and you can also change details or duration.
- Click on OK

- The attendee will now be listed in the Appointments

Editing Appointment Details

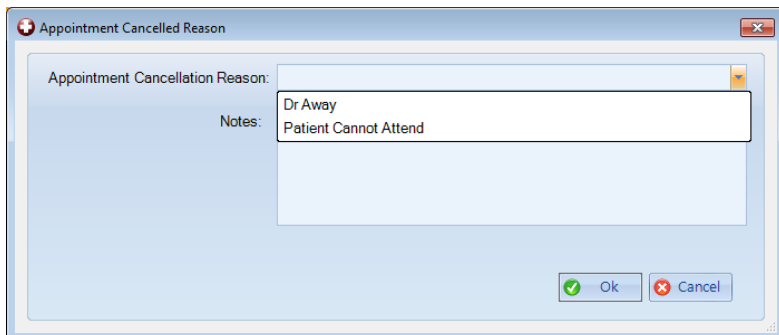
There are two ways to edit an appointment within HPM

1. Double click on the appointment and change the relevant details.
2. Right click on the appointment and click on Edit appointment

Cancel an Appointment

To delete an appointment within the system, right click on the appointment and click Cancel appointment (this will display a pop up asking if you wish to cancel the appointment)

When YES is selected the appointment cancellation reason box will appear.



Appointment Cancelled Reason

Appointment Cancellation Reason:

Notes:

Dr Away
Patient Cannot Attend

Ok Cancel

The user can pick the cancellation reason from the drop down and also type a short note as to why the appointment was cancelled.

The Waiting List

The waiting list is where you can create a list of patients who are awaiting an appointment. It can be used in the event that there are no free appointments left.

To add a name to the waiting list, click on the Waiting list option from the top ribbon. Click Add and search for the patient name. Select the patient and click OK. The patients name will appear in the waiting list.

Cancel an Appointment and show waiting list

To delete an appointment and view the waiting list, right click on the appointment and click Cancel & show waiting list. Enter the cancellation reason and click OK. You will now be presented with the waiting list and can choose one of the patients to take this appointment.

Searching for an Appointment

There is a facility within HPM to search for appointments for a list of appointments for a particular patient. To do this:

- Click on the search icon at the top of the screen
- Search for the patient as usual
- Enter Clinician if required
- Enter the date range you wish to search
- Choose the Appointment Type if needed
- Choose the appointment state: Active, DNA or Cancelled

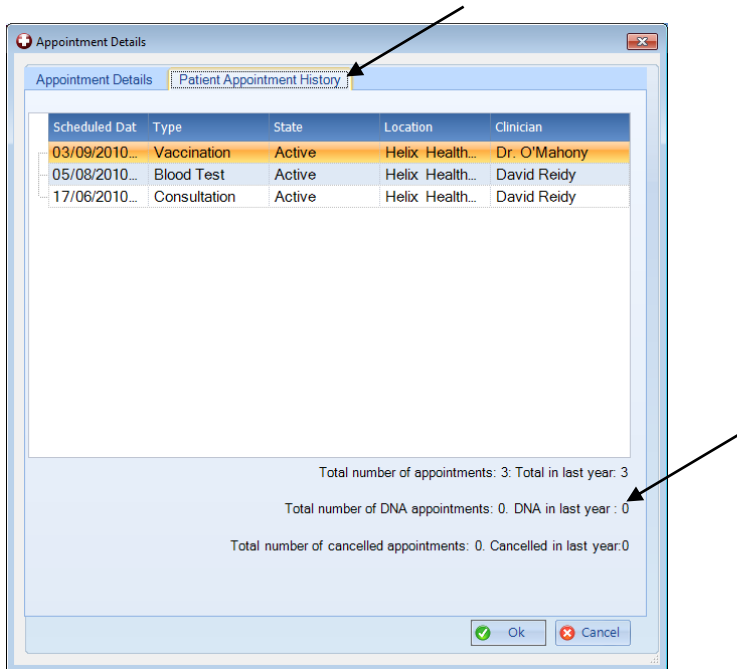
The screenshot shows the 'Appointment Search' window. At the top, there are tabs for 'Patients' and 'Other'. Below this is a search criteria section with the following fields: 'Attendee' (text input with 'test, Amy 03/01/1983'), 'From' (date picker with '01/08/2010'), 'To' (date picker with '20/08/2010'), 'Clinician' (dropdown menu with '[All]'), 'Appointment Type' (dropdown menu with '[All]'), and 'Appointment State' (dropdown menu with '[All]'). A 'Search' button is located to the right of the 'Appointment State' dropdown. Below the search criteria is a table of results with the following columns: 'Scheduled For', 'Attendee', 'DOB', 'Clinic', 'Type', and 'State'. The table contains five rows of data. At the bottom of the window, there are three buttons: 'Appointment Details', 'Cancel Appointment', and 'Print', along with a 'Close' button with a red X icon.

Scheduled For	Attendee	DOB	Clinic	Type	State
Tuesday 03/08/2010 11:00	test, Amy	03/01/1983	Nur...	Consultation	Active
Tuesday 03/08/2010 15:00	test, Amy	03/01/1983	Davi...	Consultation	Active
Thursday 05/08/2010 11:00	test, Amy	03/01/1983	Dr...	Consultation	Dna
Wednesday 11/08/2010 09:30	test, Amy	03/01/1983	Davi...	Ante-Natal	Active
Wednesday 11/08/2010 10:30	test, Amy	03/01/1983	Davi...	Consultation	Active

- From here you may then review appointment details or cancel the appointment as necessary.
- You can also print this list using the print option.

Viewing patient appointment History

While entering in an appointment you can view the attendee's appointment history by clicking the tab at the top of the Appointment details screen:



This will list all previous and future appointments and summarise DNAs, Cancelled and total appointments at the bottom of this screen.

This can also be accessed form the patient's Summary Screen through the Health Summary button.

Appointment Text Messages

Once an appointment has been added, you can send the patient a text message to remind them of their appointment date/time. This will be covered in the chapter on Text Messaging.

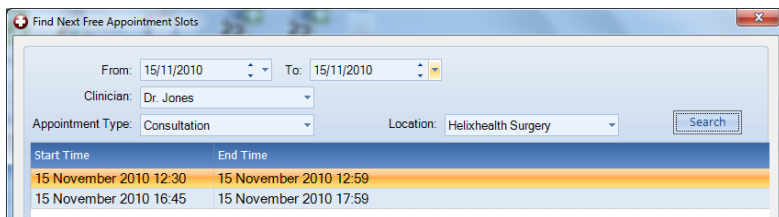
Browser

The Browser allows you to look back at past appointments either by clinician or by All Clinicians.

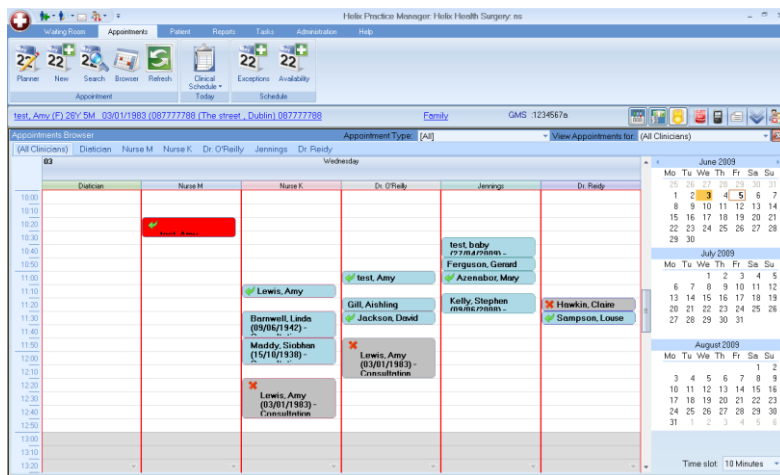
You may also view cancelled appointments from here

Next Free Appointment

Click on this option and choose the date range you want to search for a free appointment time in and the clinician you want to make the appointment with.

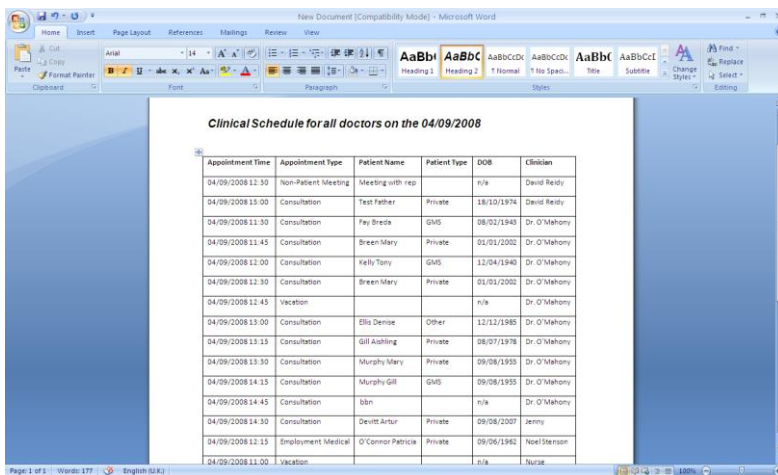


Start Time	End Time
15 November 2010 12:30	15 November 2010 12:59
15 November 2010 16:45	15 November 2010 17:59



Clinical Schedule

If you click on the calendar at the left of the screen and then click on Clinical Schedule you can print out a list of appointments either by All Clinicians or by a specific clinician.



The screenshot shows a Microsoft Word document titled "New Document (Compatibility Mode) - Microsoft Word". The document contains a table titled "Clinical Schedule for all doctors on the 04/09/2008". The table has six columns: Appointment Time, Appointment Type, Patient Name, Patient Type, DOB, and Clinician. The table lists various appointments for the date 04/09/2008, including consultations, meetings, and vacations, with patient names and doctor names listed.

Appointment Time	Appointment Type	Patient Name	Patient Type	DOB	Clinician
04/09/2008 12:30	Non-Patient Meeting	Meeting with rep		n/a	David Reidy
04/09/2008 13:00	Consultation	Test Father	Private	18/10/1974	David Reidy
04/09/2008 11:30	Consultation	Pay Brenda	GMS	08/02/1943	Dr. O'Mahony
04/09/2008 11:45	Consultation	Breen Mary	Private	01/01/2002	Dr. O'Mahony
04/09/2008 12:00	Consultation	Kelly Tony	GMS	11/04/1940	Dr. O'Mahony
04/09/2008 12:30	Consultation	Breen Mary	Private	01/01/2002	Dr. O'Mahony
04/09/2008 12:45	Vacation			n/a	Dr. O'Mahony
04/09/2008 13:00	Consultation	Ellis Denise	Other	12/12/1985	Dr. O'Mahony
04/09/2008 13:15	Consultation	Gill Aoifhling	Private	08/07/1978	Dr. O'Mahony
04/09/2008 13:30	Consultation	Murphy Mary	Private	09/08/1953	Dr. O'Mahony
04/09/2008 14:15	Consultation	Murphy Gill	GMS	09/08/1953	Dr. O'Mahony
04/09/2008 14:45	Consultation	ibbn		n/a	Dr. O'Mahony
04/09/2008 14:30	Consultation	Devitt Arbur	Private	09/08/2007	Jenny
04/09/2008 12:15	Employment Medical	O'Connor Patricia	Private	09/06/1962	Noel Stenson
04/09/2008 11:00	Vacation			n/a	Nurse

Waiting Room

Reviewing the Waiting Room List.

The waiting room displays two lists: Patients waiting i.e. patients physically present in the waiting room at the top of the screen and Patients scheduled i.e. patients who have made appointments for that day on the bottom of the screen.

The screenshot displays the Helix Practice Manager interface. The top menu bar includes Waiting Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below the menu, there are icons for Waiting, Walk-In, and Refresh. The main area is divided into two sections: Waiting Room and Scheduled.

Waiting Room Section:

Ms Herzallah, Nicole (F) 65Y 6M 03/02/1945 (79 casino Park, Family) Private

Waiting Room Location: (All) Appointment Type: [All] View Appointments for: (All Clinicians)

Attendee	Patient Type	Clinician	Appointment Type	Status	Arrival Time	Scheduled F	Waiting Tim	Outstanding A
Bloggs, Joe 11/05/1966	Private	David R...	Consultation	Complete	14:29	12:45	00:00:56	0.00
Herzallah, Nicola 03/0...	Private	Dr. O'M...	Consultation	InConsultat...	14:29	14:30	00:01:43	0.00
test, test 17/06/2010	Private	Nurse	Blood Test	Present	14:29	16:45	00:01:51	0.00
Hughes, Mary 14/10/2...	Private	Dr. O'M...	Consultation	Present	14:29	15:30	00:02:05	0.00
test, test 17/06/2010	Private	Dr. O'Ma	Blood Test	Present	14:29	16:45	00:01:51	0.00
Ferguson, Alex 31/12/...	Private	David R...	Consultation	Walkin	14:30	14:30	00:00:21	0.00

Buttons: Start Consultation, Edit Appointment, Departed, Not arrived, Not Complete, Print Rx, Accounts, View Patient Chart

Scheduled Section:

Attendee	Patient Type	Clinician	Status	Appointment Type	Schedul Δ	Outstanding A	Notes
Bloggs, Joe 11/05/1966	Private	Dr. O'Mah...	Late	Consultation	13:00	0.00	this is a test
test, amy 09/08/1965	GMS	Dr. O'Mah...	Expected	Consultation	16:00	0.00	
Test, Baby 01/02/2010	Private	Dr. O'Mah...	Expected	6 Week Check-up	17:15	0.00	
Test, Baby 01/02/2010	Private	Nurse	Expected	6 Week Check-up	17:15	0.00	
Test, John 09/10/1959	Private	Dr. O'Mah...	Expected	Exam	17:30	100.00	

Buttons: Edit, Arrived, Cancelled, Did Not Attend, View Audit Log





Colour Coding

This is a very practical feature of the HPM program that enables you to monitor the progression of patients through the waiting room.

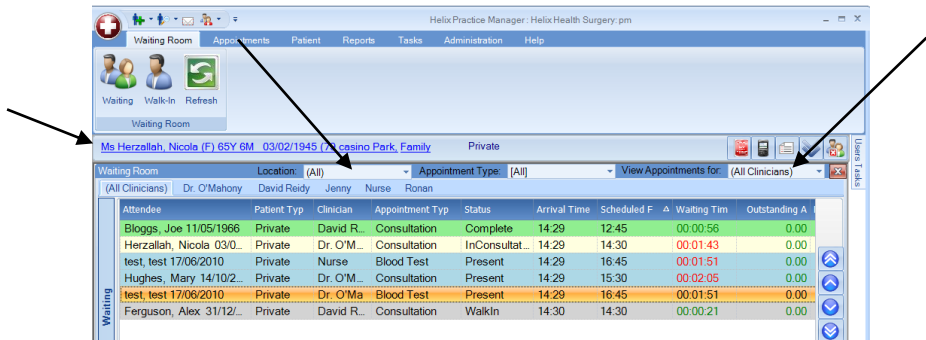
In the Scheduled area the following colours apply:

- Attendee who has made appointment and is expected
- Late Attendee

In the Waiting Room the following colours apply:

-  Attendee has arrived and is waiting to see a clinician
-  Attendee is in consultation
-  Consultation is completed
-  Attendee who is a Walk-In

Appointments can be viewed for All Clinicians, Surgery locations and appointment types together. Or you can choose to view appointments by specific location, Type or clinician by using the drop down options at the top of the Waiting Room. You can also view specific Clinicians by using the tabs at the top of the waiting room.



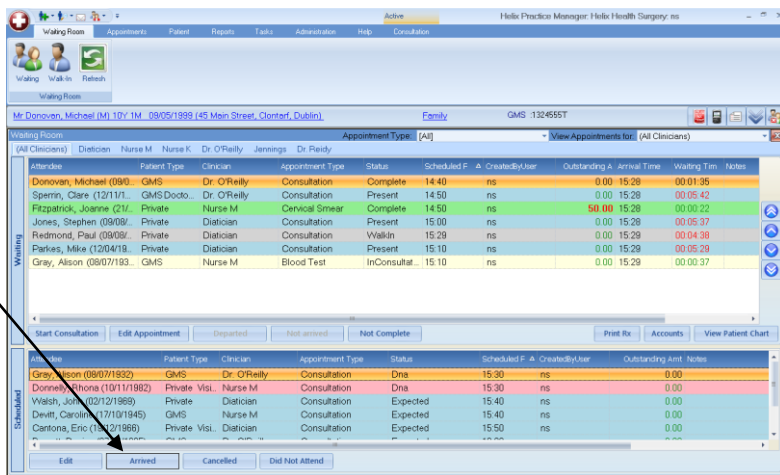
A summary line displays information about each person waiting under the following headings.

- **Attendee** – This is the name of the patient attending
- **Patient Type** – Will display if a patient is GMS, Private etc.
- **Clinician** – Will display which clinician the patient has been assigned to
- **Appointment Type** – This will display what type of appointment the patient is scheduled in for.
- **Status** – where the patient is at the moment
- **Scheduled For** – Is the time that the patient made the appointment for
- **Created By** – Who originally created the appointment
- **Outstanding Amount** – If there is a balance outstanding on a patient account it will display here, also if this patient is set up as the bill payer of the family if there are outstanding items from other members the balance will appear here also.

- **Arrival Time (Waiting only)** – This displays the actual time that the patient arrived
- **Waiting Time (Waiting only)** – This will display the amount of time that an attendee has been waiting
- **Notes (Scheduled only)** – If there are any notes on a patient they will display here.
- **Outstanding Other** – If there is money outstanding on a company account or family account it will display here.

Working with the Waiting Room

Once an attendee has arrived highlight the name and click on Arrived at the bottom of the screen



This will automatically move them up into the Waiting area.

Alternatively you can click on:

- **Edit** - which allows you change any of the details for that appointment.
- **Cancelled** – If an attendee cancels an appointment you can click this button. This removes them from the scheduled list.
- **Did not Attend** – If an attendee does not turn up click on this and it will remove them from the scheduled list.
- **View Audit Log** – This shows you the audit history of the appointment.

By using Cancelled and Did not Attend you can run a report which will give you a listing of people who cancelled or did not attend appointments.

Once an attendee has moved up to the Waiting area you have a number of options

- **Start Consultation** – Click on the attendee and click this to begin the consultation
- **Edit Appointment** - which allows you change any of the details for that appointment.
- **Departed** – Once an attendee has finished in the surgery you can click Departed and this will remove the patient from the list
- **Not Arrived** – If an attendee is moved up to Waiting in error they can be moved back down to the Scheduled list by clicking on this
- **Not Complete** – This allows you to change the patient back to present if they are not completed
- **Prioritise** – You can prioritise patients by clicking on the buttons at the side of the screen

The following options can be used for patients in either the top or bottom half of the waiting room:

- Print RX – This will bring you directly to the patient prescribing screen.
- Accounts – When you highlight a patient and click accounts it will open that patient account
- View Patient Chart – Opens the patient summary screen

Adding a Walk In to the Waiting Room

A useful feature of HPM is the ability to add an attendee to the waiting room without having to make an appointment for them.

To add a walk-in, click on 'Walk in' at the top of the screen.

On the Appointment Details full in the details as normal including the name of the patient, the type of appointment and the clinician the patient will be seeing.

Appointment Details

Patient Appointment History

Patients Other

Attendee: Bloggs, Joe 11/05/1966

GMS Details: n/a GMS Expiry Date: Not Available

Date: 03/08/2010 At: 15:13

Type: Follow-up

Duration: 30 mins

Registered to:

Clinician: ☒ Dr. O'Mahony
☐ David Reidy
☐ Jenny
☐ Nurse

Location: Helix Health Surgery

Notes:

Alerts: Test Alert

Ok Cancel

Click on OK

The attendee will now be listed in the Waiting Room in the Waiting list.

Consultations

In HPM, a consultation handles all aspects of patient health care. It links items in the patient health summary such as medications, notes, exams etc. for a patient's attendance.

Consultations should be started and finalized.

Searching for a patient



If you are not starting from the waiting room, click on the Patient tab at the top of the ribbon. Then click on the patient search icon on the top left hand side of the screen.

This will open the following screen:

Surname	First Name	Address	Date Of Birth	Reg Number
Smith	John	18 Church Street, Tallaght, Du...	01/08/75	187

Search for the patient by typing in their first name and surname and click on Search. Select the patient by clicking on the name and clicking OK.

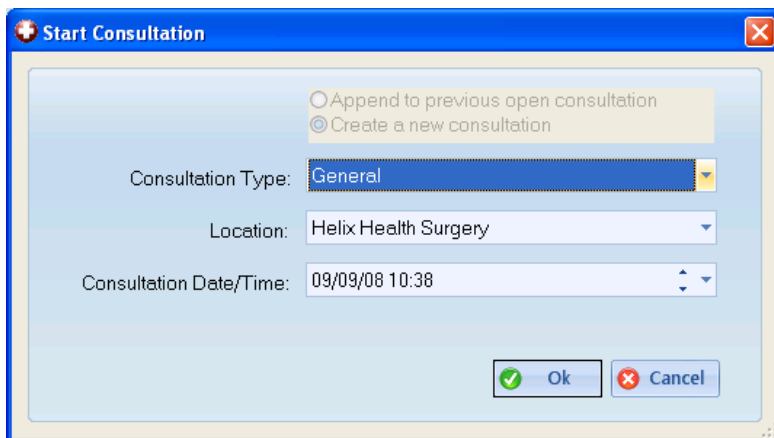
Starting a consultation

If desired you can configure the system to start a new consultation directly from the waiting room. When you click on start consultation to enter the patients file this will automatically start a new consultation.

The screenshot displays the Helix Practice Manager software interface. The top ribbon includes tabs for Waiting Room, Appointments, Patient, Reports, Tools, Administration, Help, and Consultation. The Patient tab is active, showing a patient profile for Mrs. Test, dove (Female), 15/04/1945, 63Y. The interface is divided into several sections: Documents (Medication Report), Long Term Medication (listing various medications and their dosages), Consultation Notes (listing notes from various providers), Exams (listing various exams), Medical History (listing various medical conditions), and Recall Opportunities (listing various recall opportunities). The interface is designed for managing patient records and consultations.



To manually begin a new consultation, click on the new button in the consultation group in the ribbon.



Start Consultation

☐ Append to previous open consultation
☒ Create a new consultation

Consultation Type: General

Location: Helix Health Surgery

Consultation Date/Time: 09/09/08 10:38

Ok Cancel

- First enter the Consultation Type. Most consultations will be general, but some other examples could be Vaccination, Health check, Exam or 6 week check-up.
- Then enter the location. Your main surgery will be the default here, but other locations include Patients home, nursing home, and hospital.
- Last is the time and date, this will automatically be entered as the current date and time, but can be altered to suit.

Ending a Consultation

Once the patient has left and you have entered in all the relevant details of the consultation, it is very important to end the consultation record. You can do this in the consultation tab, in the finalise group. There are two options here.

1. You can choose Finalise, and this will end the consultation and close the consultation tab, it will also close the patient health summary screen. This brings you back to the waiting room.
2. You could also choose the option Finalise and follow-up. This will do the same as the above option, but first it will open a screen where you can enter a follow-up task relating to the consultation you have just finished.

Task

Created on: 25/03/2009 11:18 By: jb jb

Related To: Patients Other
Test dave (15/04/1945)
[View Patient's Chart](#)

Assigned To: jb jb

Is Practice Task: ☐

Details:

Due: 25/03/2009

Is Urgent: ☐

Reminder Type:

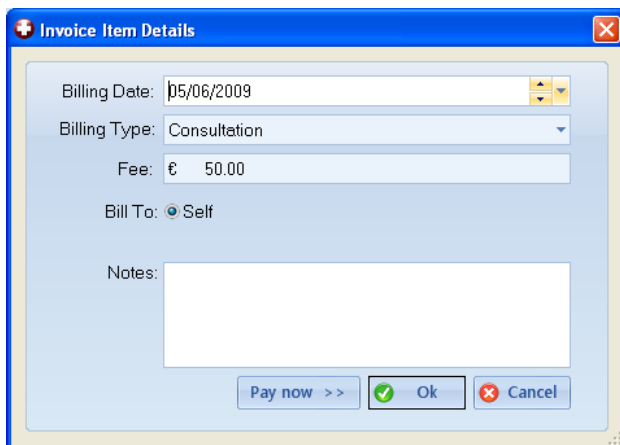
Status: ☐ Closed ☒ Opened

Ok Cancel

- The date and user who has done the consultation will be entered at the top of the screen.
- Related To - whichever patient the task is related to, generally this will be the patient who has just had the consultation and this will be automatically filled in.
- Assigned To - this task can be reassigned to any other Doctor/user in the system.
- **Is Practice Task** - This means that this task can be viewed by all other users in the system.

- **Details** - here you can describe what the task is.
- **Due** - the task can be given a due date.
- **Is Urgent** – Tick here to mark the task as urgent
- **Reminder Type** – You can be reminded about this task in three ways:
 - Next Consultation – The next time you start a consultation for this patient.
 - On system exit – When you exit the system on a particular date which you enter below.
 - Start application – When you open the application on the date entered below.
- **Status** – You can mark the task as closed or opened.
- **Other** – This option allows you to create a task which is not related to a patient in the system, all the other headings will be the same

Note: The system can be configured so that the Clinician will be prompted to record an invoice once the consultation is finalised. Once they click Finalise, or Finalise and follow-up you will see the following screen:



Invoice Item Details

Billing Date: 05/06/2009

Billing Type: Consultation

Fee: £ 50.00

Bill To: ☒ Self

Notes:

Pay now >>

Consultation Notes

Consultation notes allow you to record general details of a patient's consultation. You can free type your notes as needed, or use one of the templates provided to quickly and easily enter commonly used phrases or conditions.

You can also record conditions here which are automatically copied into the patient's Medical History.

Entering a Consultation Note



To enter a consultation note, click on the Consultation Note icon at the top of the screen or click on Add New at the right of the screen

All of the patients past notes will be listed on the screen with the most recent at the top.

Hold the cursor over any one of the consultation notes to see the full note. Alternatively double click on it

You can also see the full text of the note by holding the mouse over the details.

To add a new note, click the **Add** button at the bottom of the screen and you will see the screen below.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666

Summary

☒ Show In Summary Last Updated on: [Show Patient History](#)
[Add Vital Signs](#)
[Add Document](#)

☒ Active

Details

Consultation Note

Template Category:
Template:
Note Date: 03/08/2010 At: 15:22
Confidential Item: ☐
Summary:
Detail:

Conditions

Add New Condition

Condition:
Description:
☐ Show in Family History
Category:
☐ Chronic ☐ Acute
☒ Active **Add**

Patient Conditions

Sel	Current Cond	Desc	Act	Cat	Fa
<input checked="" type="checkbox"/>	End-stage...	tes...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	HEART DI...	tes...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	ASTHMA		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	OSTEOP...		<input checked="" type="checkbox"/>		

www.gpnotebook.com/ <http://www.bmj.com/> <http://www.patient.co.uk/>
<http://www.nice.org.uk/> <http://hse.sspcrs.ie/doctor>

Print Notes

Summary

- Show in summary – Any consultation notes that you don't want appearing on the patient summary screen you can hide by un-ticking this option, the note will still appear in consultation notes area.
- Active – You can de-activate any consultation note
- Show Patient History – this will open a summary of the patients chart where you can choose different sections to view

- Add Vital signs – This link will open the add new exam page where you can add in new vital signs results without closing the consultation note.
- Add Document – This link will open the Add new document screen where you can create letters of forms.

Patient History for Amy test

Text View List View

Show: ☒ Consultations ☒ Long Term Medications ☒ Conditions ☒ Exams From: To:

☒ Consultation Notes ☒ Acute Medications ☒ Immunisations ☒ Documents

Patient Details
Patient Name: Amy test
Address: The street , Dublin
Date of Birth: 03/01/1983

Wednesday 28 October 2009
Long Term Medication
YASMIN TABS 0.03MG/3MG 3 X 21 Type:Private
THREE AT NIGHT

Friday 5 June 2009
Consultation
Done By: Type:General At Location:Helix Health Surgery
Done By: Type:General At Location:Helix Health Surgery

Consultation Notes
fgfgf
bh.fvh.fgh.ffg.fgh.fgh.fg.fg.f

Documents
test

Wednesday 3 June 2009
Consultation
Done By: Type:General At Location:Helix Health Surgery

Long Term Medication

Print Show InActive Cancel

You can print all the details on this screen using the print button at the bottom of the screen.

Consultation Note

- Template Category – There are a number of template notes set up in this section. Here is where you choose the category of the note.

- Template – After you have selected a category for the template a selection of note headings will appear here in a drop down list
- Note Date – This will default to today's date, but can be altered in order to back date items.
- Confidential Item – If this option is ticked, the note will not appear on the patient summary screen. There will just be a message to say that there is a note, but that it is confidential and can only be viewed by the original author.
- Summary – Here is where you can type a heading or subject of the note.
- Detail – Here is where the main text of the note will be. You will either type in here, or a phrase will appear depending on which of the templates you have used.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666

Summary

☒ Show In Summary Last Updated on: [Show Patient History](#)
[Add Vital Signs](#)
[Add Document](#)

Details

Consultation Note

Template Category: General Conditions

Template: [Dropdown Menu]

Note Date: BP Elevated
BP Low
BP Normal

Confidential Item: ☒ Chest Infection

Summary: Chest Pain

Detail: Flu

Conditions

Add New Condition

Condition: [Text Field]

Description: [Text Field]

Category: [Dropdown Menu]

☒ Chronic ☐ Acute

☒ Active [Add](#)

Patient Conditions

Sel	Current Cond	Desc	Acti	Cat	Fa
<input checked="" type="checkbox"/>	End-stage...	tes...	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	HEART DI...	tes...	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	ASTHMA		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	OSTEOP...		<input checked="" type="checkbox"/>		

www.gpnotebook.com <http://www.bmj.com/> <http://www.patient.co.uk/>
<http://www.nice.org.uk/> <http://hse.spcrs.ie/doctor>

Print Notes ☒ Ok ☒ Cancel

Note: You can add you own items to the Template Category and the Templates from the administration section in Lists and Drop downs. (See chapter on administration for details)

Conditions

- Condition – You can enter in a new condition or diagnosis here, this will also appear in the patient's Medical History section.
- Patient Conditions – Here you will see a list of the patients current medical Conditions. You can choose to link one of these conditions to this consultation note by ticking the box

Links

The following links are also provided at the end of the screen for easy access:



<http://www.bmj.com/>
<http://www.nice.org.uk/>
<http://www.gpnotebook.com>
<http://www.patient.co.uk/>
<http://hse.sspcrs.ie/doctor>

Simply click on the link and you your internet browser will automatically open on the page you selected.

When you have finished recording the details of the consultation note click OK to save.

STC Form

On the Consultation Notes screen, you can print off an STC form. Click the button at the bottom of the screen called STC Form, and the form will open. Fill in the details required and click the print icon to print the form.

Consultation History:

Another way of viewing the consultation history which will also show any other activity within that consultation is to click on the 'Consultation History' tab on the top of the screen.

The screenshot shows the Helix Practice Manager software interface. The top menu bar includes options like Waiting Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below the menu bar is a toolbar with various icons. The main content area has tabs for Documents, Long Term Medication, Consultation Notes, Tests, Medical History, and Maternity. The Consultation History tab is active, showing a list of consultations with dates and times. A black arrow points to the 'Consultation History' tab.

Documents	Long Term Medication	Consultation Notes	Tests	Medical History	Maternity
nov09	25/01/2010 Islin Tabs 10mg Amlodipine Pco 1 Daily X 2	PM General Consultation 27/10/2009 16:22	Vital Signs (04/09/2009) Completed	30/09/2009 DIABETES INSULIN DEPENDENT diagnosed in 2004	02/11/2009 09:31:32 Gestation: 23w Weight: BP/
02/11/2009	30/11/2009 Valium Tabs 5mg 1 Tid X 28 Mite 86 Repeat	PM 6 Week check up 6 week check: ventolastent 21/10/2009 15:40	30 weeks Exam (04/09/2009) Completed	30/09/2009 diabetic	27/10/2009 16:22:22 Gestation: 22w Weight: BP/
02/11/2009	27/11/2009 Buscopan Tabs 10mg 2 Twice Daily X 28 Mite	PM 6 Week check up Consultation 21/10/2009 15:40	to visit with Joe Murphy 02/11/2009		27/10/2009 16:22:19 Gestation: 22w Weight: BP/
02/11/2009		PM 6 Week check up Consultation 21/10/2009 15:38	Maternity Claim on 02/11/2009		30/09/2009 07:29:15 Gestation: 18w Weight: BP/
02/11/2009		PM 6 Week check up softadiff 21/10/2009 15:38	Consent Form 28/10/2009		04/09/2009 09:43:06 Gestation: 14w Weight: BP/
30/09/2009		PM Vaccination 21/10/2009 15:34	Standard Patient Letter 30/09/2009		
04/09/2009			Cardiology Mater Declan Sugrue 04/09/2009		
Sept 09					

Click on the date to view entries for that date

The screenshot displays the Helix Practice Manager software interface. The top menu bar includes options like Patients, Add, New, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Recall, HL7 Messages, Documents, Sketch, Accounts, and Alerts. The patient information section shows 'Mr Breen, Jenny (Female)' with a date of birth of 09/08/1977 and a contact number. The 'Alerts' section lists 'DEAFNESS' and 'Pneumonia (Critical)'. The 'Consultation History' section shows a list of consultations from 25/03/2009 to 14/03/2009. The selected consultation on 14/03/2009 is detailed below.

Brand Name	Generic Name	Days Supply	Quantity	Long Term	Directions	Repeats
AMOXIL PAED SUSP 12	AMOXICILLIN	30	30	<input checked="" type="checkbox"/>	AS DIRECTED	3

Condition	Description	Exam Name	Abnormal	Status
Asthma All Types		Vital Signs	No	Completed
		FBC	No	Awaiting

The patient's test result came back negative.

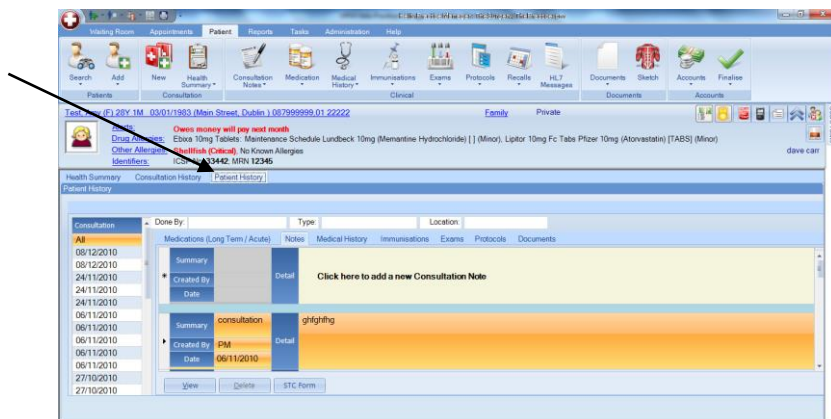
14 of 15

Adobe Updater: Update is ready to be installed.

Patient History

Patient History is another way to enter consultations on a patient. The method of entry used is entirely up to the user.

In the patient summary screen click on patient history



All information that can be entered on the health summary screen can be entered in this area.

E.g. to add a consultation click on Add New Note: This will create a consultation summary box with today's date and who it was entered by;

Prescriptions

The prescription entry section can be accessed from the patient Health Summary screen, where long term meds are displayed. Click on this link to view the patient's prescription history.

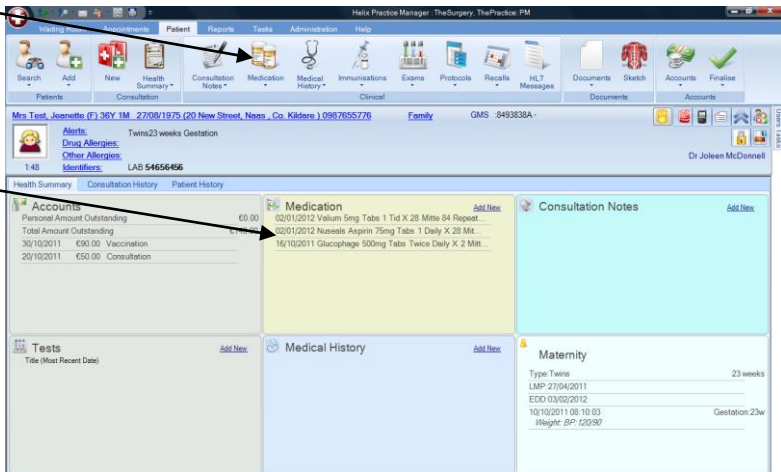
The drug list used in HPM is the IPU (Irish Pharmaceutical Union) list. This can be updated from the Helix Health Website.

Entering a Prescription

Entering a New Prescription – Long Term and Acute

To enter a prescription click on Medication on the patient summary screen or Medication on the ribbon at the top

There is also a quick add button called Add New in the Medication area that will take you to the Medications section and start a new prescription.



Entering a Prescription

- Click on New at the bottom of the screen. A new prescription item screen will open
- If there the patient is allergic to the drug, a message will pop up to indicate this.

The screenshot displays a software window titled "Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666". The window contains a form for drug management. At the top, there is a "Search Type:" section with three radio buttons: "Both" (selected), "Generic Name", and "Trade Name". Below this is a "Drug:" text field with a search icon and a red notification icon. A checkbox labeled "Controlled" is present, along with an "Add New Drug" button. The "Directions:" section includes a "Codes" checkbox. A large, empty text area is visible below the directions. The "Days Supply:" section has a numeric field set to "0" and a "Long term" checkbox. The "Quantity:" section has a numeric field set to "0.0" and a "Unit:" text field. The "Repeats:" section has a numeric field set to "1" and a "Use As Default" checkbox. The "Review Date:" and "Reissue Date:" sections both show "03/08/2010". The "Condition:" section has a text field with a search icon. The "Notes:" section has a large text area. The "Drug Usage Review:" section shows "(No Drug selected)". At the bottom, there is a "Last Updated on:" label and three buttons: "Add", "Ok" (with a green checkmark), and "Cancel" (with a red X).

Search for the drug by typing in the first few letters of the name of the drug and a drop down list will appear. You can use this list to find the drug required or to see more detail click the search icon. You can choose to search by either Generic name or trade name or both.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666

Search Type: ☒ Both ☐ Generic Name ☐ Trade Name

Drug: amox

Directions:

Days Supply:

Repeats: 1

Review Date: 03/08/2010

Reissue Date: 03/08/2010

Condition:

Notes:

Amoxil Syrup Forte 250mg/5ml Susp 250mg/5ml (Amoxicillin) [GSK MED]
Amoxicillin 50 () [VETOQUIN]
Amoxycillin La Inj Hostamox La () [INTERVET]
Clonamox Caps 250mg Amoxicillin (Amoxicillin) [CLONMEL]
Geramox Caps 250mg Amoxicillin (Amoxicillin) [GERARD]
Pinamox Caps 250mg Amoxicillin (Amoxicillin) [PINWOOD]
Geramox Caps 500mg Amoxicillin (Amoxicillin) [GERARD]
Clonamox Caps 500mg Amoxicillin (Amoxicillin) [CLONMEL]

If the drug you are looking for is not on the list click cancel and then Click the Add new drug button. This allows you add in a user added drug, trade name, generic name and other details will need to be added.

User Defined Drug

Brand Name:

Generic Name:

Manufacturer:

Form:

Strength:

Pack Size:

Drug Type: GMS

Unit Price (Ex. VAT): 0

Controlled: ☐

InActive: ☐

Ok Cancel

- You now need to enter the directions for that drug. There is a predefined list within the system but if you want to free text untick the codes box above the field.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666

Search Type: ☒ Both ☐ Generic Name ☐ Trade Name

Drug: Clonamox Caps 250mg Amoxicillin (Amoxicillin) [CLONMEL]

☐ Controlled ☐ Codes

Directions: 3t

Days Supply: 3T (THREE TO BE TAKEN THREE TIMES DAILY)

☐ Long term Unit:

Repeats: 1

☒ Use As Default

Review Date: 31/08/2010 Reissue Date: 31/08/2010

Condition:

Notes:

Drug Usage Review: **Contraindications for selected drug**
Discontinue if rash develops, and consult the doctor.

Last Updated on:

Add Ok Cancel

Highlight the directions you wish to use and TAB out of the field

- You now need to enter the Days' Supply and the Quantity.
- There is option to enter the units if required when entering a liquid or powder.
- If this is a Long Term Drug you must tick the Long Term tick box and enter in the number of repeats. This will automatically calculate the next review date
- The review date can be changed according to the number of repeats requested. If you enter 6 repeats

this will automatically calculate the review date for 6 months into the future.

Bloggs, Joe (M) 1M0W 12/10/2010 (Manchester City, Manchester, England)

Search Type: ☒ Both ☐ Generic Name ☐ Trade Name

Drug: Warfant Tabs 5mg Warfarin (Warfarin) [ANTIGEN]

☐ Controlled Add New Drug

Directions: ONE TO BE TAKEN DAILY

☒ Codes

1d

Days Supply: 30 Quantity: 30

☐ Long term Unit:

Dispense: 1 ☒ Use As Default

Review Date: 18/12/2010 Reissue Date: 18/12/2010

Condition:

Notes:

Drug Usage Review: **Interactions**
Losec Mups 10mg Gast Resist Tabs: Imed (Omeprazole) [IMED] interacts with Warfarin Teva 5mg Tabs (Warfarin) [TEVA] (Pharmacological and/or toxicological effect enhanced: Potentially serious.)
Losec Mups 10mg Gast Resist Tabs: Imed (Omeprazole) [IMED] interacts with

Last Updated on: Add ✓ Ok ✗ Cancel

- If required you can enter a condition associated with this drug. This will then be inserted into the patient's Medical History
 - Drug Usage Review - Any interactions and contraindications will be displayed here in Red
 - Click on Add to add another drug to this prescription or click on OK if finished
- Once all the required items have been entered click on OK to view the prescription.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Rivervally, Swords, Co.Dublin) 0876566666

Prescription Details

Issue Date: 03/08/2010 Prescribed Elsewhere: ☐ Record Only: ☐
Prescription Type: GMS 3 Month [Tripli] Prescriber: PM

Item Details

Drug	Direction	Days	Qty	Repeats
Clonamox Caps 250mg Amoxicillin (Amoxicillin)	THREE TO BE TAKE	28	84	3

Edit Add Delete Days Supply: 28 Quantity: 84 Update Days/Qty Repeats: 3 Update Repeats

(No alerts found in the currently active Drug File)

Drug Contraindications
Clonamox Caps 250mg Amoxicillin (Amoxicillin) [CLONMEL]: Discontinue if rash develops, and consult the doctor.

Save & Print OK Cancel

- From here you can change the Issue date for the prescription.
- You can also choose the prescription Type, i.e. GMS / Private / GMS 3 month.
- You can record if the prescription has been given elsewhere or if it is for record only
- Use the Update Days/ Quantity button to change details of one or more items on the prescription.
- When the prescription is ready to print, click Save & Print which will send the prescription to the printer or click on OK which will save the record in the system.

Once you have done a prescription you will see each drug listed individually under the following headings

- Prescription Type – Private, 3 month GMS, 1 month GMS etc.
- Issued – This is the date that the prescription was issued
- Drug – Will list the name of the drug

- Controlled – If the drug prescribed is a controlled drug the box will be ticked
- Directions – Drug Directions will be listed here
- Days
- Prescriber
- Repeats
- Review Date
- Reissue Date

Long Term Drugs

When you enter the patient's medication screen active acute and long term prescriptions will display on the same page. Both lists can be collapsed or expanded if required by clicking on the **+** or **–** sign beside Acute or Long Term headings.

Helix Practice Manager: Helix Health Surgery

Waiting Room Appointments Patient Reports Tasks Administration Help

Search Add New Health Summary Consultation Notes Medication Medical History Immunisations Exams Protocols Recalls HL7 Messages Documents Sketch Accounts Finalise

Patients Consultation Clinical Documents Accounts Finalise

Alerts Patient has aggressive tendencies. Patient has not paid bill
Drug Allergies Distasteme Tabs 250mg Alliance 250mg [TABTS] (Critical), Lipitor 20mg Fc Tabs Proford (Atorvastatin) [TABTS] (Critical)
Other Allergies No Known Allergies
Identifiers

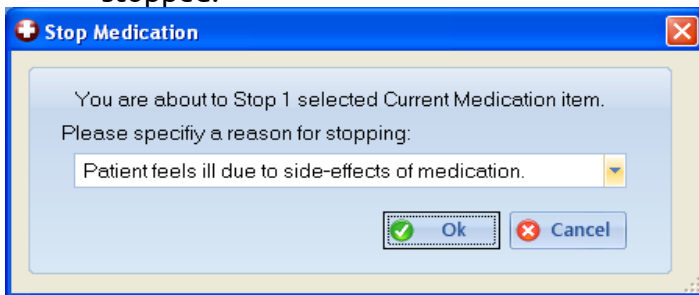
Dr David Raidy

Prescription Type	Issued	Drug	Control	Direction	Days	Qty	Prescriber	Repeats	Review Date	Reissue Date
Type: Acute (1 item)	17/06/2010	Amoxicillin 500mg		1d1	28	28	Dr Noel Ste...	1	01/11/2010	15/07/2010
Type: Long Term (2 items)										
GMS 1 Month	17/06/2010	Glucophage Tabs 500mg (Mett...		ONE TO BE TAK...	28	56	Dr Dr. O'Ma...	3	09/09/2010	09/09/2010
GMS 3 Month	17/06/2010	Cipramil 20mg Tabs B&S (Citalo...		ONE TO BE TAK...	28	28	Dr Dr. O'Ma...	3	09/09/2010	09/09/2010

View Audit Log Print LT Re-Issue Longterm New Print Stop

Active Expired Chronic Expires in 7 days Acute Expires in 7 days Close

- Once you click on a long term drug on this list you have a number of options
- Edit – you can edit the prescription up to 24 hours of creating it.
- New – Add a new drug to the prescription
- Stop – Discontinues a drug from the active long term list. A popup will appear asking to confirm the action and to record a reason why it is being stopped.

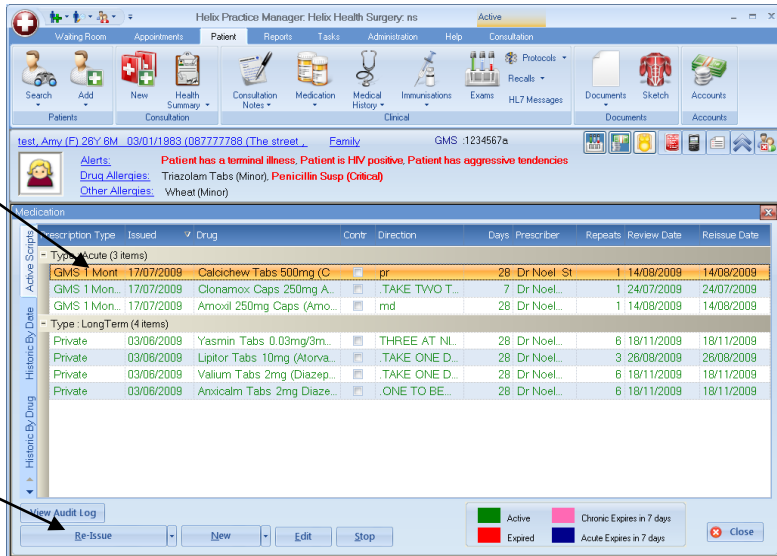


Repeating Prescriptions

Acute Prescriptions

To repeat an acute prescription open the medications screen

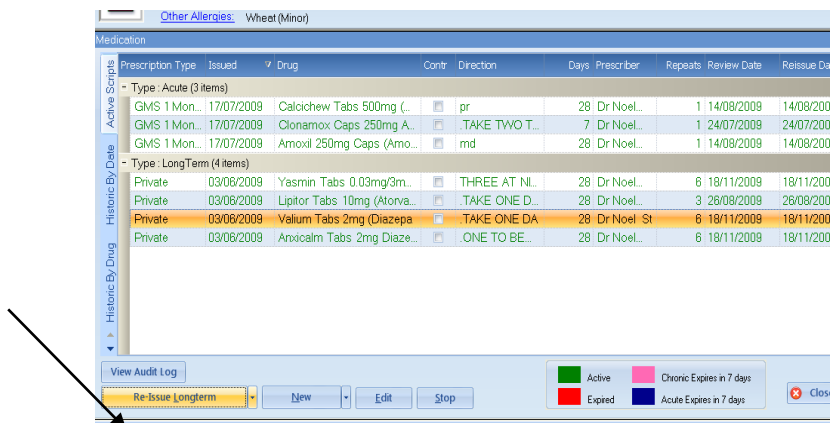
- Select the drug required and click Re-Issue at the bottom of the screen



- This will open the prescriptions screen on today's date.
- From here you can edit or add another drug to the prescription
- Click on OK to save or Save and Print to print the prescription

Repeating Long Term Prescriptions

- Open the medications screen
- To re-issue all long term medications, click Re-Issue Long Term



- To select certain drugs to reissue, hold down the Ctrl key on your keyboard and click on the required drugs. Then click on Re-Issue
- Both the above options will open the prescriptions screen allowing you to edit the prescription before printing. If you do not need to edit any items select Re-Issue Long Term and Print or Re-Issue and Print to print the script immediately. This will save an extra mouse click.

Colour Coding

Within the prescriptions screen when drugs are about to expire or are due for renewal they are highlighted in various colours.

test, Amy (F) 26Y 6M 03/01/1983 (067777788 (The street... Family GMS :1234567a

Alerts: Patient has a terminal illness. Patient is HIV positive. Patient has aggressive tendencies
Drug Allergies: Triazolam Tabs (Minor), Penicillin Susp (Critical)
Other Allergies: Wheat (Minor)

Prescription Type	Issued	Drug	Control	Direction	Days	Prescriber	Repeats	Review Date	Reissue Date
Type - Acute (4 items)									
Private	17/07/2009	Fosamax Once Weekly T...		1d	4	Dr Noel...	1	21/07/2009	21/07/2009
Private	17/07/2009	Calcichew Tabs 500mg (...)		pr	28	Dr Noel...	1	22/07/2009	22/07/2009
Private	17/07/2009	Clonamox Caps 250mg A...		TAKE TWO T...	7	Dr Noel...	1	24/07/2009	24/07/2009
Private	17/07/2009	Amoxil 250mg Caps (Amo...		md	28	Dr Noel...	1	14/08/2009	14/08/2009
Type - LongTerm (7 items)									
Private	17/07/2009	Ventolin Evohaler 100mc...		ONE PUFF T...	28	Dr Noel...	6	01/01/2010	01/01/2010
Private	17/07/2009	Eltroxin Tabs 100mcg (Le...		1d	28	Dr Noel...	3	09/10/2009	09/10/2009
Private	17/07/2009	Warfarin Tabs 5mg Warfar...		1d	5	Dr Noel...	1	22/07/2009	22/07/2009
Private	15/04/2009	Deltacortril Ent Tab 2.5mg...		bd	28	Dr Noel...	2	10/08/2009	10/08/2009
Private	03/02/2009	Anxocalm Tabs 2mg Diaze...		ONE TO BE	28	Dr Noel...	6	21/07/2009	21/07/2009
Private	03/02/2009	Lipitor Tabs 10mg (Atorva...		TAKE ONE D...	28	Dr Noel...	3	28/04/2009	28/04/2009
Private	03/02/2009	Yasmin Tabs 0.03mg/3m...		THREE AT NI...	28	Dr Noel...	6	21/07/2009	21/07/2009

View Audit Log

Re-issue Longterm New Print Stop

Active Chronic Expires in 7 days
Expired Acute Expires in 7 days

Close



Means that the drug is Active within the patient file



Means that the review date for this drug has expired and the patient needs to make an appointment to see the doctor



This is for chronic or long term drugs and means that the review date will expire within 7 days



This is for acute drugs which will expire within 7 days

Historic Scripts

Historic Scripts within the system are long term prescriptions that have been stopped and expired acute prescriptions.

This ensures that only the current active prescriptions are viewed when you enter the patient chart.

Historic Scripts are divided into two sections:

1. Historic By Date – Lists historic prescriptions in date order.
2. Historic By Drug – Lists historic prescriptions by drug name. This is useful to see every time a particular drug has been given.

The screenshot shows the Helix Practice Manager interface for a patient named Amy (F) 26Y 6M. The patient's medical history includes a terminal illness, HIV positivity, and aggressive tendencies. The medication list shows various prescriptions, including Anxicalm, Clarithromycin, Floxapen, Liptor, and Pinnex. The 'Printed Scripts' section is highlighted in the left sidebar, and two arrows point to it from the left margin.

Issued	Type	Drug	Control	Direction	Prescriber	Days	Repeats	Review Date	Reissue Date
- Drug : Anxicalm Tabs 2mg Diazepam (Diazepam) (1 item)									
27/05/2009	Lon...	Anxicalm Tabs 2m...		ONE TO BE TAKEN...	Dr Noel...	28	6	11/11/2009	11/11/2009
- Drug : Clarithromycin 250mg Tabs (Clarithromycin) (1 item)									
03/06/2009	Acute	Clarithromycin 25...		ONE TO BE TAKEN...	Dr James...	7	1	10/06/2009	10/06/2009
- Drug : Floxapen Caps 500mg (Flucloxacillin) (5 items)									
15/05/2009	Lon...	Floxapen Caps 50...		ONE TO BE TAKEN...	Dr Noel...	28	3	07/08/2009	07/08/2009
15/05/2009	Long	Floxapen Caps 500		ONE TO BE TAKEN	Dr James...	28	3	07/08/2009	07/08/2009
01/05/2009	Lon...	Floxapen Caps 50...		AS DIRECTED	Dr Noel...	28	1	29/05/2009	29/05/2009
27/04/2009	Lon...	Floxapen Caps 50...		AS DIRECTED	PM	28	1	25/05/2009	25/05/2009
27/04/2009	Lon...	Floxapen Caps 50...		AS DIRECTED	PM	28	1	25/05/2009	25/05/2009
- Drug : Liptor Tabs 10mg (Atorvastatin) (2 items)									
15/05/2009	Lon...	Liptor Tabs 10mg...		TAKE ONE DAILY	Dr Noel...	28	3	07/08/2009	07/08/2009
15/05/2009	Lon...	Liptor Tabs 10mg...		TAKE ONE DAILY	Dr James...	28	3	07/08/2009	07/08/2009
- Drug : Pinnex Caps 250mg Amoxicillin (Amoxicillin) (2 items)									
20/04/2009	Acute	Pinnex Caps 25...		TAKE ONE DAILY	PM	7	1	07/05/2009	07/05/2009

View Audit Log

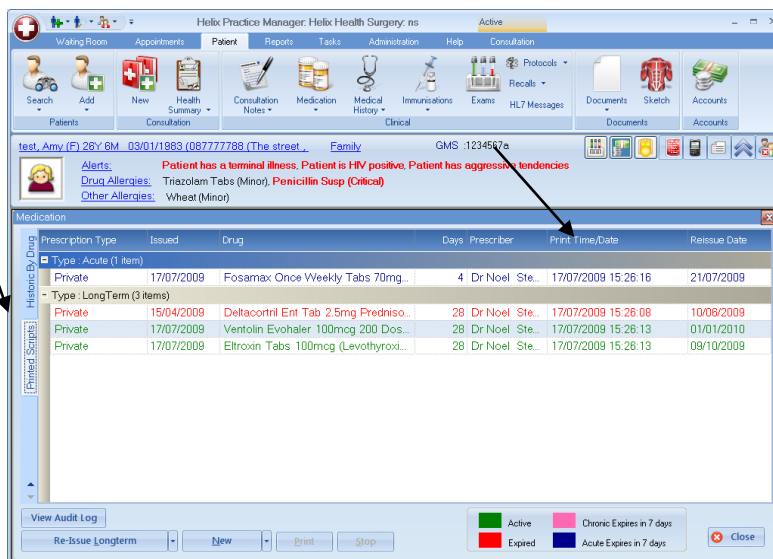
Re-Issue New Edit Stop

Active Chronic Expires in 7 days
Expired Acute Expires in 7 days

Close

Printed Scripts

Any prescription printed for this patient will be listed here with the time and date that the prescription is printed.



Drug Substitutions

Servier – a drug replacement of Acerycal is suggested to take place when Coversyl and Amlodipine are prescribed together.

Menarini Requirement – a drug replacement of Nebilet Plus is suggested to take place when Nebilet and Dyazide are prescribed together.

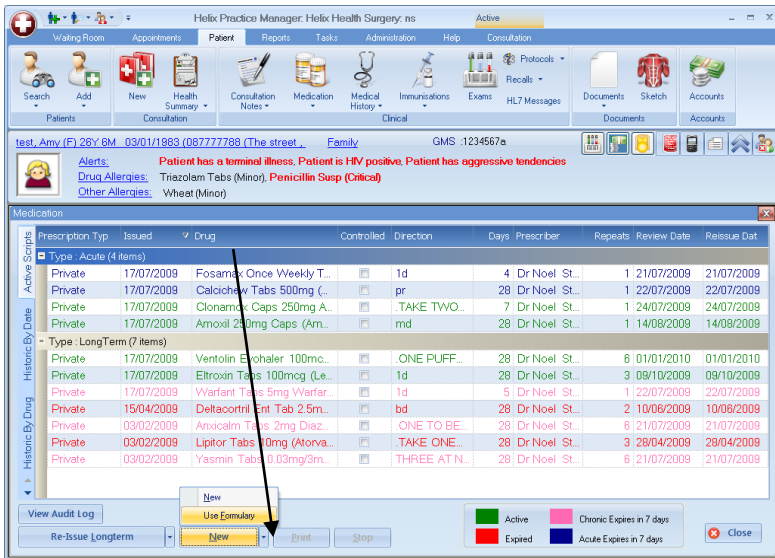
Abbott Requirement – we have renamed 'Optium Plus Strips' to 'FreeStyle Optium blood glucose test strips' and 'Optium β Ketone Test Strips' to 'FreeStyle Optium β ketone test strips'

Leo Pharma Requirements – A replacement of Dovobet Gel is suggested to take place when Dovobet Ointment is prescribed. If the prescriber gives Dovonex of a size that no longer exists, Dovonex Cream 30g is suggested as a replacement, as it is only available in this size.

Prescribing from Practice Formulae

A practice Formulae can be set up by the users to help speed up the prescribing. Drugs can be selected from the IPU list and categorized for quicker access. This can be set up in Administration and will be dealt in that chapter.

To use the practice formulae click on the drop down at the bottom of the medication screen beside the New button and choose Use Formulary.



This will display the list that has been set up by the user in Administration.

Select the category required by clicking the drop down list beside Select Formulary and the drugs will be displayed.

Drug	Direction	Days	Qty	Repeats
Ventodisks 400m	Inh/refill (Salbutamol)	.ONE PUFF TO BE I	30	1 1

To select more than one drug from the list hold the ctrl key down and click on the drugs required. When you have selected all the drugs, click ok. As the directions etc. have been pre-set in Administration the script is ready to issue. But repeats or any edits for the patient can be changed here.

Prescription Details

Issue Date: 09/01/2009 Prescribed Elsewhere: ☐ Record Only: ☐

Prescription Type: Private Prescriber: Dr Jenny

Item Details

Drug	Direction	Days	Qty	Repeats
Augmentin Duo 400/57mg/5ml Pdr/oral Sus Sus...	ONE TO BE TAK...	7	21	1
Codinex Codeine Linctus 15mg/5ml S/f Syrup 15...	AS DIRECTED	7	1	1

Edit Add Delete

1 Change Repeats

Drug Warnings
Augmentin Duo 400/57mg/5ml Pdr/oral Sus Susp 400mg/57mg (Amoxicillin/clavulanic Ad). Take before food.
Augmentin Duo 400/57mg/5ml Pdr/oral Sus Susp 400mg/57mg (Amoxicillin/clavulanic Ad). Shake well before use.

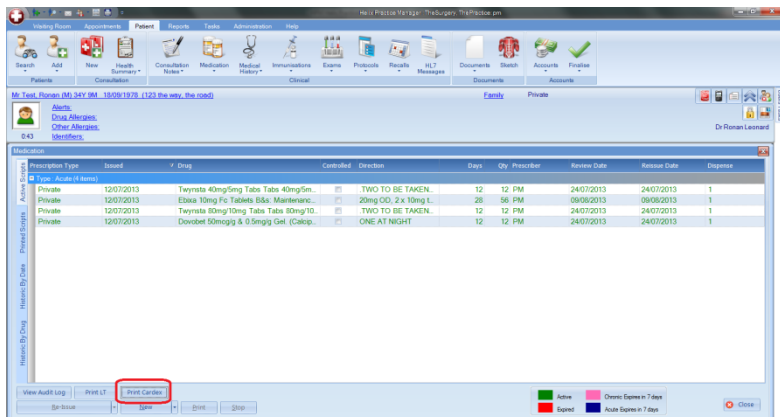
Drug Contraindications
Augmentin Duo 400/57mg/5ml Pdr/oral Sus Susp 400mg/57mg (Amoxicillin/clavulanic Ad). Discontinue if rash develops, and consult the doctor.
Augmentin Duo 400/57mg/5ml Pdr/oral Sus Susp 400mg/57mg (Amoxicillin/clavulanic Ad). Advise patients

Save & Print Ok Cancel

Click Save & Print to print the script and record in the patients chart.

Cardex

Cardex button is also available on the medications screen. This Cardex template is editable in the templates section under Helix Manager - Medication. A Cardex sheet would be used mainly by nursing homes and contains a list of the patient's active acute and long term medications. A PRN (as required) check box and method drop down are present on the main medications screen and these will populate onto the Cardex



Medical History

The patient's medical history is recorded in this area. It also records family medical history so that a patient's medical history can be seen in any family members' charts.

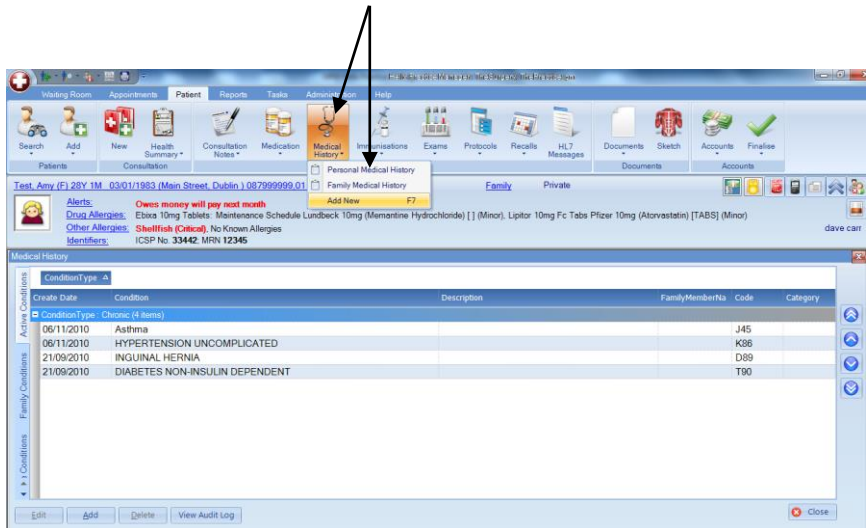
The codes that are used in this section are the ICPC 2 (International classification for primary care) and the ICD10 (International classification of diseases Version 10).

The Medical Reports section will report on either or both of these coding schemes.

Recording Patients Medical History



To record a diagnosis in a patients chart, click on the Medical History icon in the ribbon. You will see a drop down list with two options, Personal Medical History and Family Medical History.



- Personal Medical history is where you record any conditions that are relating to this patient.
- Family Medical History will show family member's medical history.

When you have selected the Personal Medical history option from the list, you will see a full list of any medical history. There are three tabs on the left hand side of the screen, Active Medical Conditions, Family Medical Conditions, and Inactive Medical Conditions.

The list of Active Medical Conditions is divided into Acute and Chronic conditions.

To add a new item –

- Click the Add button at the bottom of the screen.
You will then see the screen below.

Medical Condition Search

Please Select the Coding Type you wish to use: Default

asthma

Search

Condition	Icd 10 Code	Icp 2 Cod	GP Code
ASTHMA		R96	
Asthma	J45		
Status asthmaticus	J46		
Family history of asthma and other chronic lower respiratory	Z82.5		
Mixed asthma	J45.8		

ASTHMA

Others to consider:
wheezing [R03](#), cough [R05](#)

Criteria for inclusion:
recurrent episodes of reversible acute bronchial obstruction with wheeze/dry cough; or diagnostic test meeting currently accepted criteria for asthma

Excluded:
bronchiolitis [R78](#); chronic bronchitis [R79](#); emphysema [R95](#)

Ok Cancel

- Select the Coding type you want to use by clicking the drop down list. You can choose from ICD10, ICPC, or if available in your surgery ICPC2 Plus.
- Then type in either part of or the full name of the medical condition you wish to enter in the while box at the top of the screen, you can also type the code if you know it e.g. R96 for Asthma.
- Once you click Search, the system will search coding list chosen, to find any matching results. These will appear in a list in the middle of the screen.

- ICPC2 codes will also give a description of the diagnosis including Other Items to Consider, Criteria for Inclusion and Excluded items.
- Then simply click the one you want to use and click OK.

You will then see the screen below:

test, baby (F) 10M 1W 07/05/2010 (address1, address2, address3, address4) 08728311,8212999

Summary

☒ Show In Summary Last Updated on: [Show Patient History](#)
[Add Vital Signs](#)
[Add Document](#)

☒ Active

Details

☒ Free Text Condition

Condition:

Description:

☐ Show in Family History

Date of Diagnosis: 16/03/2011

Category:

☒ Chronic ☐ Acute

- The Active tick box means that this diagnosis is active for the patient. You can archive old items that are no longer relevant by un-ticking this box.
- Show in Summary- If there is something of a sensitive nature or you don't want the diagnosis to appear on the patient's Health Summary screen simply un-tick this box. The information will still be within the medical history section but will not show on the main summary screen.
- Show Patient History – this will open a summary of the patients chart where you can choose different sections to view

- Add Vital signs – This link will open the add new exam page where you can add in new vital signs results without closing the consultation note.
- Add Document – This link will open the Add new document screen where you can create letters of forms.
- Condition – This is the condition which you selected previously.
- Free Text Condition – If you could not find a suitable condition from the coded lists, you can free type in your own conditions here
- Description – this is where you can enter any comments on the condition.
- Show in Family History - this tick-box means that this condition will be seen in the family medical history section in family member's charts.
- Date of Diagnosis
- Category – you can group items by assigning them to a particular category (This list can be added to in system Administration- Lists and Drop downs)
- Chronic and Acute – Conditions can be marked as Chronic or Acute

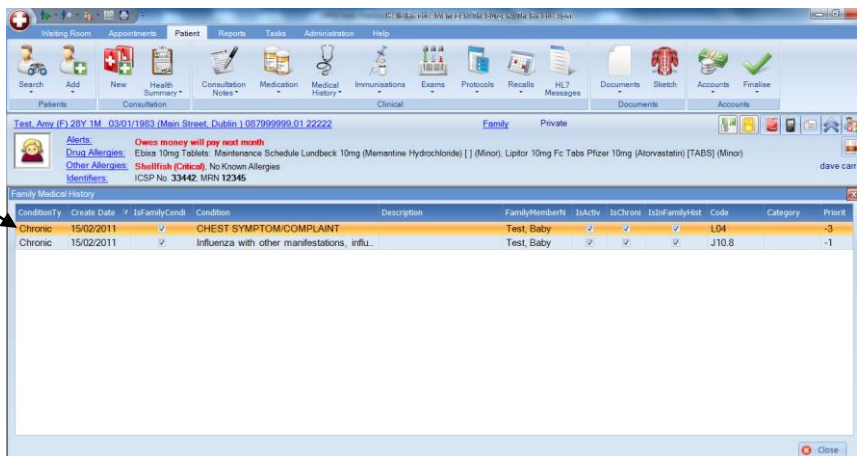
Once all these items are correct, click OK and the condition is saved in the patient's medical History.

Medical conditions can also be entered through Consultation notes. Any conditions entered there will also appear here in Medical History.

Family Medical History

To view any Medical history relating to the whole family, click the icon for Medical History and choose the option Family Medical History from the drop down list. Alternatively, click the Family History tab from the patient's Medical History.

Here you will see a list of any family member's conditions which have been marked as Show In Family History.



Editing Medical History

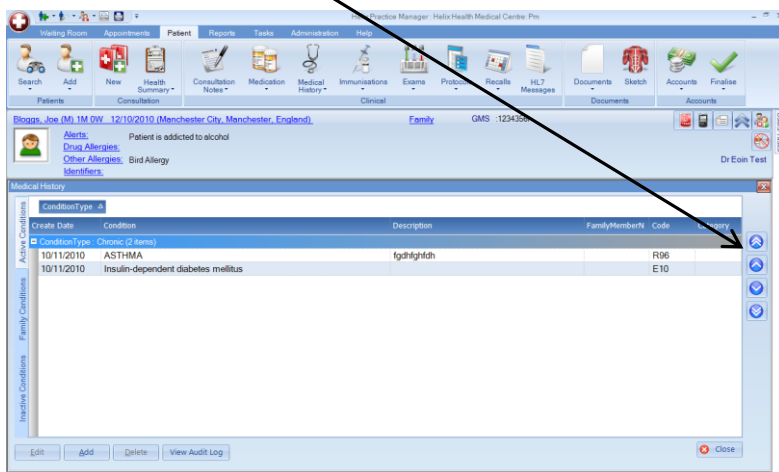
To edit an item entered in Medical History, open Personal Medical History, highlight the item you want to change by clicking on it once and then click the Edit button at the bottom of the screen. Make any changes necessary, and then click OK.

Note: You can only edit items within 24 hours of when they are added in. After that they are locked and can only be viewed, or made inactive

Prioritise Medical Conditions

The conditions in the medical history panel on the health summary screen will appear in the selected order instead of ordering by the date in which they were added.

Use the arrows on the right hand side of the screen to prioritise the medical conditions.

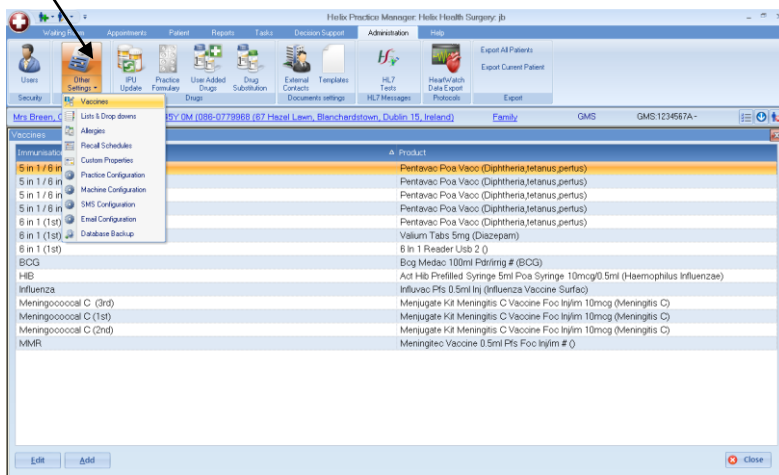


Vaccines

Before you can administer a vaccine to a patient, the products that you use must be entered into the system. The best time to do this is whenever a batch of vaccines arrives into the surgery.

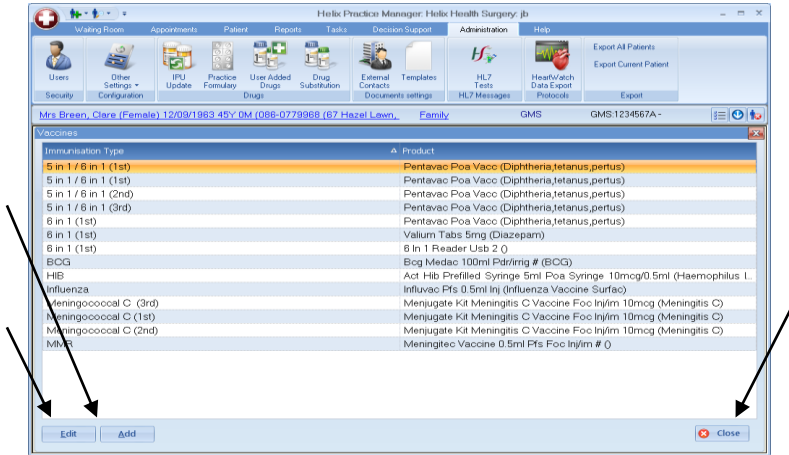
Vaccines in the Surgery:

To view a list of your vaccines in stock, go to Administration, Other Settings, and Vaccines as shown below:



On the left hand side of the screen, you can see the “Immunisation Type” (i.e. 5 in 1, influenza, MMR etc.). On

the right hand side you can see the product (you have in stock) used to administer the immunisation (influvac, etc.):



On the bottom of this screen, you can add new vaccines, edit current vaccines or close out of the screen.

Adding a Vaccine:

Click on the Add button at the bottom of the screen:

The screenshot shows the 'Add/Edit Vaccines' window. It features a 'Drug:' field with a search icon, a 'Types:' dropdown menu currently set to 'Immunisation Type', and 'Add' and 'Delete' buttons. Below these are 'Default Site:', 'Default Method:', and 'Default Dose:' dropdown menus, followed by a 'Notes:' text box. There is an 'Is Inactive:' checkbox. A 'Batches:' section contains a table with columns 'Expiry Date', 'Batch Number', and 'Active'. At the bottom are 'Edit' and 'Add' buttons, and 'Ok' and 'Cancel' buttons with green and red icons respectively.

You must enter the Drug used for the immunisation. You can search the IPU file for this by typing in the first few letters of the drug name.

You must also enter the type of vaccination this is (i.e. Influenza, MMR etc.).

The default site of the injection (right thigh etc.), the default method (oral, topical, IV etc.), and the default dose can also be enter here – these can all be filled using the drop-down arrows on the fields.

Note: The Vaccination Type drop down list can be added to or edited from System Administration in the list and drop downs section.

You can then enter the batch number and expiry date of the product. Several batches and expiry dates can be stored against one vaccine, so as new batches of vaccines come in, you need only enter the batch number and expiry dates if the same drug has been entered previously. When a vaccine is expired or withdrawn, you can set it to inactive.

The screenshot shows the 'Add/Edit Vaccines' window. The 'Drug' field is set to 'Infanrix Hexa Vaccine 6 In 1 Pfs Ppa Inj - () [SB PHARM]'. The 'Immunisation Type' dropdown is open, showing '6 in 1 (3rd)', '6 in 1 (2nd)', and '6 in 1 (1st)'. The 'Default Site' is 'Left Anterolateral Thigh', 'Default Method' is 'IM', and 'Default Dose' is '0.5ml'. The 'Notes' field is empty. The 'Is Inactive' checkbox is unchecked. The 'Batches' table has columns 'Expiry Date', 'Batch Number', and 'Active'. One batch is listed: '01/01/2011', '12345A', and 'Active' (checked). The 'Add' button is highlighted.

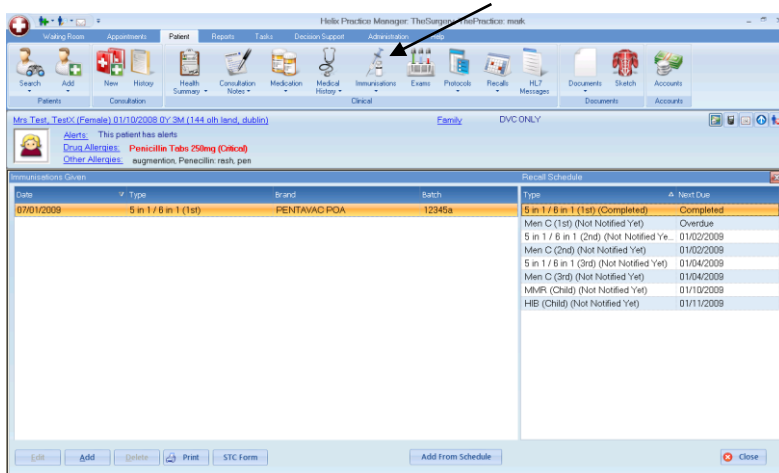
Expiry Date	Batch Number	Active
01/01/2011	12345A	<input checked="" type="checkbox"/>

Editing a Vaccine:

It is possible to edit vaccine details much the same way as adding a new vaccine.

Administering a Vaccine:

When you have a patient open, click on Immunisations, on the ribbon:



This will bring up a list of all vaccines the patient has received, and it is here that you can add, delete or edit vaccines in the patient record, print your patient immunisation card, your HSE Vaccination Record Form, or print your STC forms.

If you click on Add – the following screen appears:

The screenshot shows the 'Immunisation' entry form in the Helix Practice Manager. The window title is 'Test, Amy (F) 28Y 1M 03/01/1983 (Main Street, Dublin) 087999999,01 22222'. The form is divided into 'Summary' and 'Details' sections.

Summary:

- ☒ Show In Summary
- ☒ Active
- Last Updated on: [blank]
- [Show Patient History](#)
- [Add Vital Signs](#)
- [Add Document](#)

Details:

Immunisation:

- Immunisation Type: Influenza
- Vaccine: (15487) INFLUVAC PFS 0.5ML [S] (highlighted)
- Batch Number: 15487
- Expiry Date: 21/05/2011
- Manufacturer: SOLVAY HC
- Date Administered: 15/02/2011
- Dose: [blank]
- Administered By: PM test
- Site: [blank]
- Method: [blank]
- ☐ Administered Elsewhere
- ☐ Cancelled
- Patient Temperature: [blank]
- Notes: [blank]

Reaction:

Reaction	Date Recorded
<input type="checkbox"/> Anaphylaxis	
<input type="checkbox"/> Cardiac	
<input type="checkbox"/> Chest tightening	
<input type="checkbox"/> Constipated	
<input type="checkbox"/> Convulsions	
<input type="checkbox"/> Cough and/or puff...	
<input type="checkbox"/> Diarrhoea	
<input type="checkbox"/> Difficulty Breathing	
<input type="checkbox"/> Difficulty in waking	

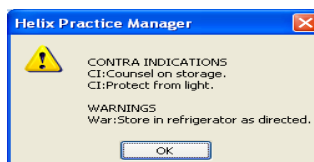
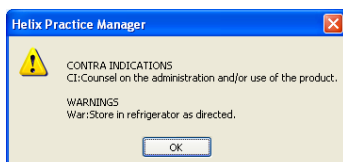
Reaction/Intolerance:

- ☒ Reaction
- ☐ Intolerance
- Recorded On: [blank]
- Reaction Note: [blank]

Buttons: Ok Cancel

After you choose the Immunisation Type, the list of products (and batches) stored against this type become available in the Vaccine field.

After picking the batch number, you will sometimes get a message similar to these:



These are simple warnings and suggestions stored against the drug itself.

Once you pick the batch number here, the rest of the information is filled in automatically – Expiry Date, Manufacturer, Date Administered (today's date), Dose, Administered By, Site, and Method. This is the information you have stored against each vaccine when adding it to the surgery. The details can be changed here if necessary. There is also space on the right hand side to note any adverse reactions that the patient had to the vaccine, including the date and a note on the reaction.

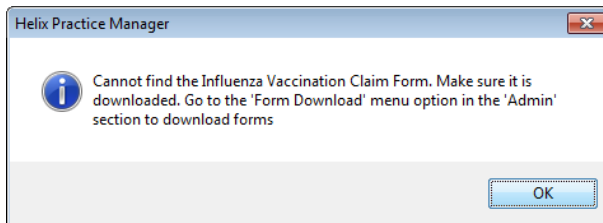
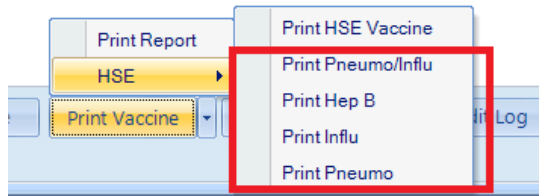
These details are then saved in the patient history (Vaccines Section), and can be edited or printed from there.

Printing STC forms

To print an STC form, simply highlight the vaccine to be included on the form by clicking once on it. Then click the button STC Form. The vaccine details will be filled in automatically. You can then fill in the rest and print the form.

Vaccine Forms

Four new vaccine forms have been added to the system. These can be accessed in the patient chart. The first time a site tries to access them, they will be prompted to download them in the admin -> form download.



Inca Travel Vaccination Application

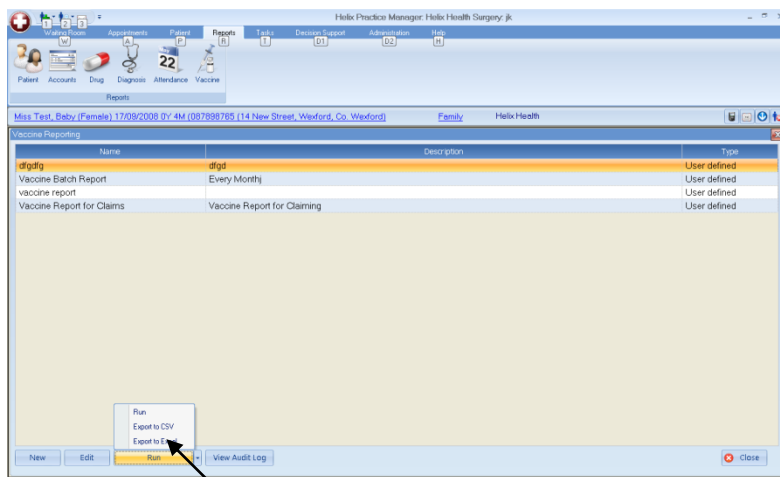
Helix Health has entered into a partnership with Incaplex to integrate their feature rich Travel Vaccination application, Inca Clinic, into the Helix Practice Manager Application.

Inca Clinic is a dedicated travel medicine software that makes it easier for users to run a travel vaccine service.

This service can be setup in a few simple steps. Please call the GP Support Team on 01-4633000 for more information.

Vaccine Reports

To create or run reports on vaccines, go to Reports, Vaccine. Clicking on the New button allows you to create a new report:

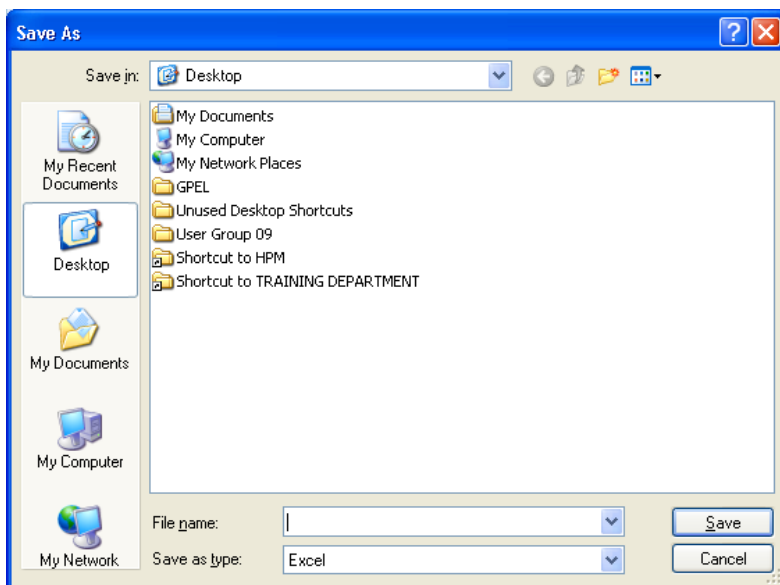


Here you can select the dates for which to run the report, and you can also narrow it down by patient age, gender, or clinician. On the bottom of the screen you can select which Vaccine Types, which Vaccines, and which Batch Numbers to include in the report. You can select these using the drop down arrows, and clicking Add (the Influenza Vaccine has been added above). You can add as many vaccines to the list as you want.

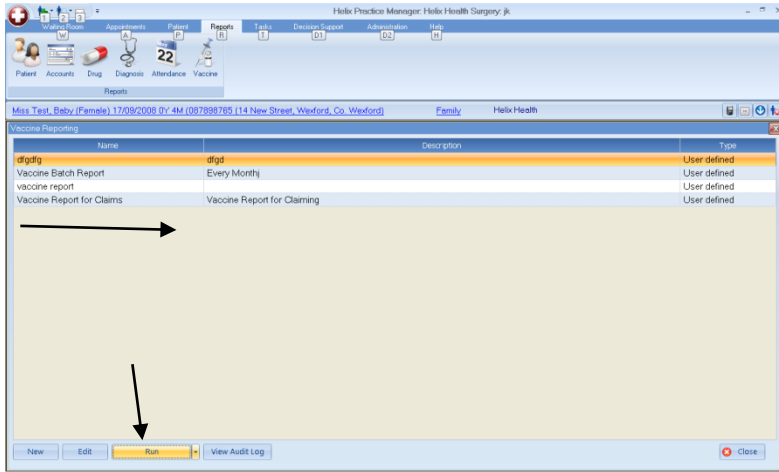
At this point, you can either run the report, or save it, to be run later. There are three options for running a report:

- Run – this will run the report and give you a preview in Word of what it looks like – you can print it out from here.
- Export to CSV – will export the data to a CSV file to be saved on your computer.
- Export to Excel – will export the data to an Excel file.

When exporting, you will be asked where you want to save the file, and what you want to call it:



The report will not open automatically, but is just saved to the location specified above.



Once the report is created and saved, it can be run at any time by clicking on the Run button as shown above.

Batch Childhood Vaccine Report

In order to send you Batch Childhood Vaccine claim report, you will need to have a report set up to print all vaccines for the month. You can do this by creating a vaccine report that will print an individual report for each child with a list of all vaccines given. This can then be sent to the Health Board for claims.

NB! The Mother's name and date of birth must be filled in in the patient details area, in the contacts tab, for it to be entered onto the form. The health boards require that the mother's name and date of birth be on the form.

You will need to create this report only once, every month you can simply change the dates required.

1. Click on New to create a new report.
2. Put in the dates required, you do not need to enter in a specific age group, so this can be left as the default. Gender and Clinician should not be needed either.
3. Put a tick in the box to print one patient per page:
4. Choose the option Show: Any –
5. Select the Vaccine type that you want to include in the report and click ADD.

Vaccine Reporting

Patients

From Date: 01/01/2008 To Date: 07/01/2009

Age Between: 0 And: 150

Gender: [All]

Clinician: [All]

☒ Show one patient per page

Vaccines

Show: **Any** SortBy: **Patient Name**

Vaccine Type	Vaccine Name	Batch Number
5 in 1 (1st)	Pentavac Poa Vacc (Diphtheria,tetanus,pertus)	All
5 in 1 (2nd)	Pentavac Poa Vacc (Diphtheria,tetanus,pertus)	All
5 in 1 (3rd)	Pentavac Poa Vacc (Diphtheria,tetanus,pertus)	All
5 in 1 (3rd)	Pentavac Poa Vacc (Diphtheria,tetanus,pertus)	All
6 in 1 (1st)	Pentavac Poa Vacc (Diphtheria,tetanus,pertus)	All
6 in 1 (1st)	Menjugate Kit Meningitis C Vaccine Foc Inj/Im 10mcg (Meningiti	All
HIB	Act Hib Prefilled Syringe 5ml Poa Syringe 10mcg/0.5ml (Haemo	All
MMR	Meninger Vaccine 0.5ml Pfs Foc Inj/Im # 0	All

Vaccine Type: **5 in 1 (1st)**

Vaccine: **5 in 1 (1st)**

Batch Number: [All]

Add **Delete**

Save **Cancel**

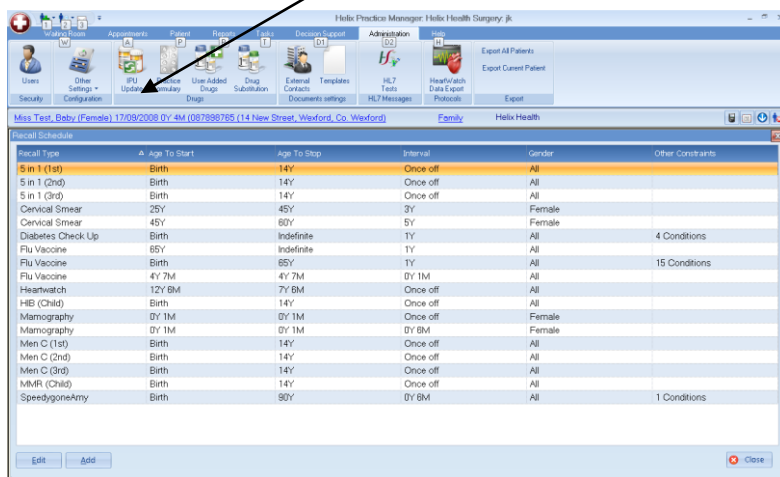
6. The vaccine names will default to All Vaccines. There may be more than one vaccine given, e.g. for the 6 in 1 (1st) Pentavac and Men C are both given. Therefore, both these vaccines will be included.
7. Repeat this process of adding vaccines until you have included all the vaccines you need to have in the report.
8. Once all the required vaccines are entered, Click Save, or Run to run the report.

9. When you save the report you will need to enter in a name and, if needed, a description.
10. To run the report again for the next month, click on the report, and select Edit. Change the dates required and click Run.

Recalls

Setting Up Recalls:

Go to Administration, Other Settings, and Recall Schedules:



Here you can view Recall Schedules already set up, or add new ones.

Clicking on Add brings up the following screen:

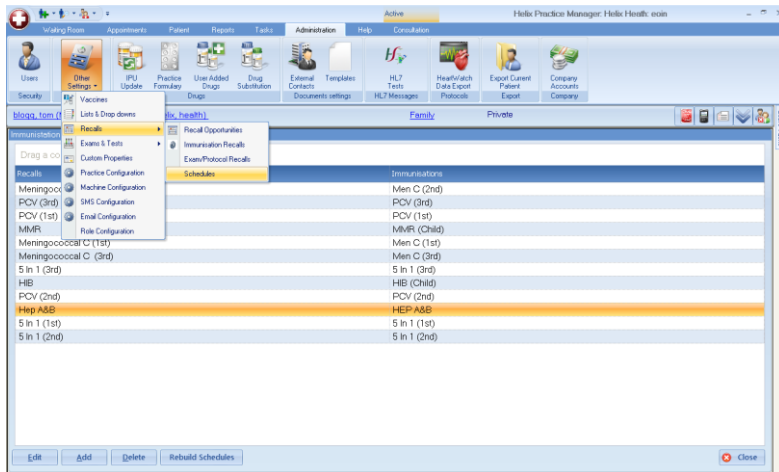
Here you must pick the Recall Type from the drop down list. You can enter age parameters to narrow down which patients you want to target. You can also enter gender, repeat interval, and enter conditions such as medications, family conditions, or medical conditions.

This is useful for setting up a recall (e.g. a Diabetes Check Up) for anyone with any type of Diabetes saved against their Medical Conditions. You can also set up recalls for patients who are on certain medications – e.g. all warfarin patients, all people on ventolin inhalers etc. This is very useful if medications are being changed or withdrawn from the market.

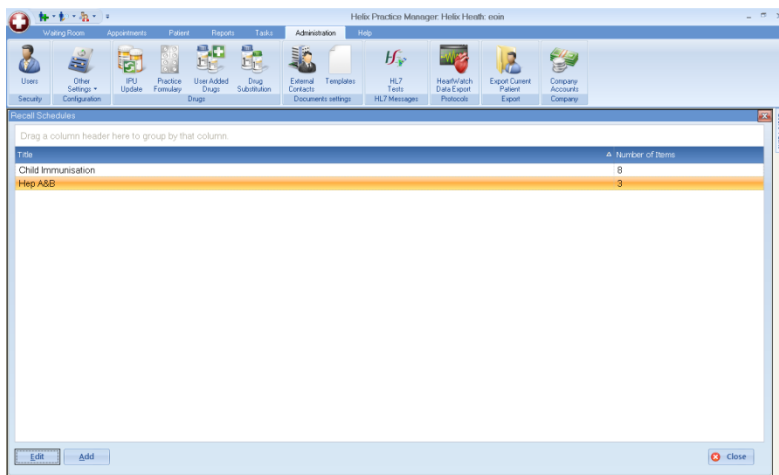
Note: There is an extra feature in Lists and Drops in the recall menu called threshold, currently it is only needed for the flu recall. The system defaults to with 184 days threshold which is the duration of the flu season from 1st September. Say for example you add a threshold of 100, it will change the status of the recall opportunity from 'completed' to 'not notified yet ' 100 days before the next due flu recall for the patient. This is to let users know the patient hasn't had the flu vaccine for the forthcoming flu vaccine season (start of Sept until March). This will enable to search for all patients in the system due for a flu recall.

Creating a new Recall Opportunity

Select Administration – Other Settings – Recalls – Schedules

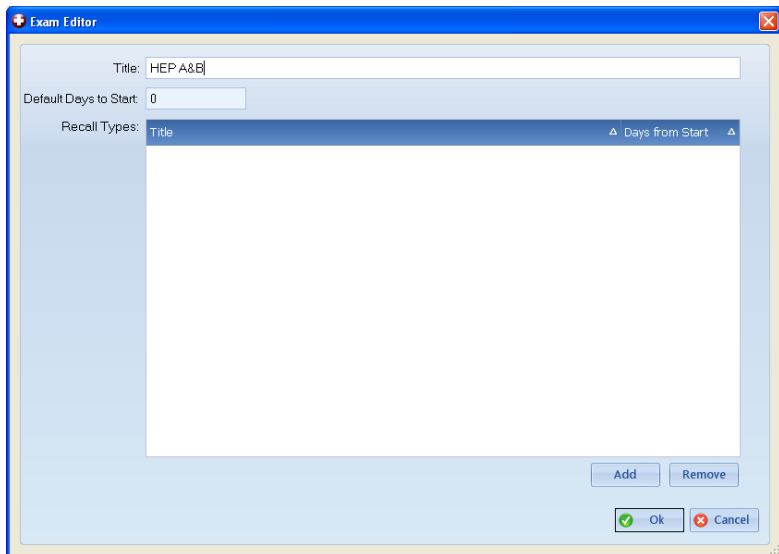


Select Add to setup the schedule



Enter the title eg. HEP A&B

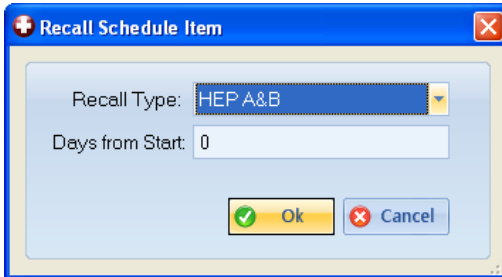
Select Add to enter the first recall



Select the recall type from the drop down

Leave Days from start at 0 to start from today

Press OK



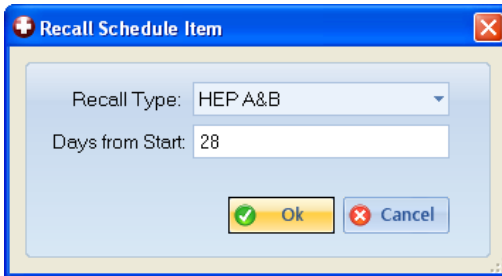
Select Add again to enter the second recall

Select the recall type from the drop down

In days from start enter the number of days after the first immunisation you want the second immunisation to take place.

Eg. If you enter 28 the 2nd immunisation will be scheduled 28 days (4 weeks) after the first immunisation

Press OK



A screenshot of a software dialog box titled "Recall Schedule Item". It features a blue header bar with a red cross icon on the left and a red 'X' icon on the right. The main area has a light blue background. It contains two input fields: "Recall Type:" with a dropdown menu showing "HEP A&B", and "Days from Start:" with a text box containing "28". At the bottom, there are two buttons: "Ok" with a green checkmark icon and "Cancel" with a red 'X' icon.

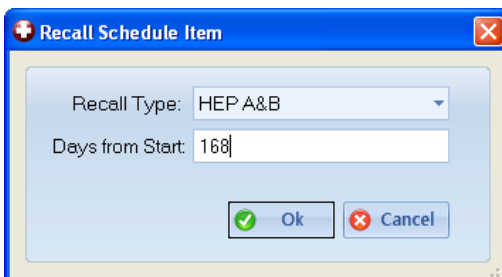
Select Add again to enter the third recall

Select the recall type from the drop down

In days from start enter the number of days after the first immunisation you want the third immunisation to take place.

Eg. If you enter 168 the 3rd immunisation will be scheduled 168 days (6 months) after the first immunisation

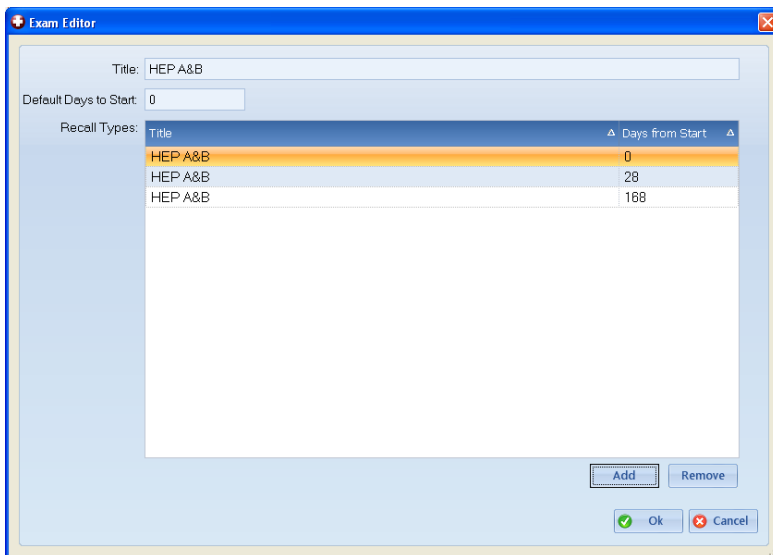
Press OK



A second screenshot of the "Recall Schedule Item" dialog box. The "Recall Type:" dropdown still shows "HEP A&B". The "Days from Start:" text box now contains the number "168". The "Ok" and "Cancel" buttons remain at the bottom.

You will now see the three scheduled immunisations set up

Select OK

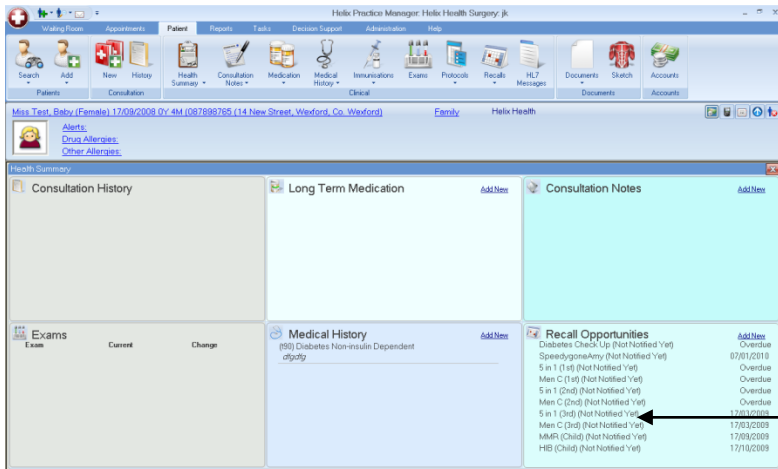


The screenshot shows the 'Exam Editor' window. At the top, there is a 'Title' field containing 'HEP A&B' and a 'Default Days to Start' field containing '0'. Below these is a table titled 'Recall Types:'. The table has two columns: 'Title' and 'Days from Start'. The first row is highlighted in orange and shows 'HEP A&B' and '0'. The second row shows 'HEP A&B' and '28'. The third row shows 'HEP A&B' and '168'. At the bottom right of the window, there are four buttons: 'Add', 'Remove', 'Ok' (with a green checkmark icon), and 'Cancel' (with a red X icon).

Title	Days from Start
HEP A&B	0
HEP A&B	28
HEP A&B	168

Patient's Recall Opportunities:

Once the recalls are set up and created, a patient's recall opportunities should automatically appear on the patient front screen:

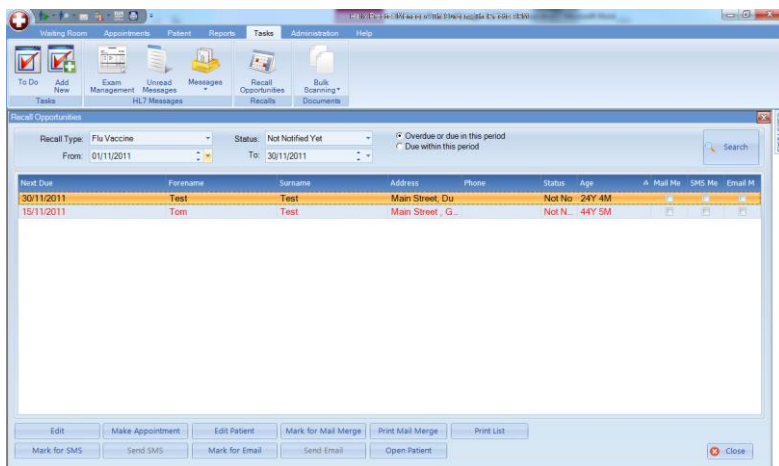


You can double click on this section to bring up the patient's recalls. In a child's record, any immunisations they are due to get will appear here. Once they are given these immunisations, they will disappear from this section as the status is changed to complete automatically. This is slightly different for recalls that are created by the user. For example if you set up a new recall called "Flu Vaccine" for female patients aged over 50, the recall will appear here for every female patient over 50 (as status "Not Notified Yet"). Once you administer the vaccine to the patient, you must change its status to "Complete" manually

Using Recall Opportunities:

After setting up Recalls (above), you can then put them to use. For example, if you have set up a recall called “Flu Vaccine” for all patients over 50, you may want to see all your patients over 50 who have not yet received their flu shot.

To view all Recall Opportunities, go to Tasks, Recall Opportunities:



Here you can search for any patients who fall into any of the recall opportunities you have set up on your system. You can search for these patients by choosing the Recall Type and the Status (from drop down lists), and you can also choose a date range, then click on Search, and a list of all patients who fall into this recall type and status are returned.

In the above example, you can select your “Flu Vaccine” as the recall type, and “not notified yet” as the status. This will return a list of all patients who have not yet received their flu vaccine. Or if you wanted to search for all patients who have gotten the vaccine this month, you can change the status to “Completed”, and the date range to this month, and click the search button.

You can sort your search results based on any of the column headers (Next Due, Surname, Status, etc.).

From this screen you have a number of options that can be performed on each line:

- **Edit:** this allows you to edit the recall – i.e. change the recall type, due date or status (e.g. from “Not Notified Yet” to “Completed”)
- **Make An Appointment:** this will bring up the Appointments Planner and allow you to enter an appointment for this patient.
- **Edit Patient:** this allows you to edit the patient’s details. It is useful if you find that a certain patient should not be appearing in this recall type (i.e. their details may need changing), or for entering phone numbers and email addresses for the SMS and Email Merges.
- **Mark for Mail Merge:** marks all highlighted patients for a mail merge. You can see the “Mail Merge” box is ticked after clicking this button.
- **Print Mail Merge:** prints a letter for all patients previously marked for mail merge.

- **Mark for SMS:** marks all highlighted patients for SMS. You can see the “SMS Merge” box is ticked. Note: Ensure that the mobile number is entered for the patient and also that consent to SMS in patient registration is ticked.
- **Send SMS:** sends a standard text to all patients marked for SMS.
- **Mark for Email:** marks all highlighted patients for Email. You can see the “Email Merge” box is ticked.
- **Send Email:** sends an email to all patients marked for Email.
- **Open Patient** – Highlight a patient and select this option to view the patients chart
- **Print List** – Use this option to print the result list of recalled patients.

Note – the patient must be set to consent to SMS / Email (in patient details) and a valid mobile number / email address must be entered against the patient. This can be done quickly by clicking “Edit Patient” and entering the details here.

Examinations

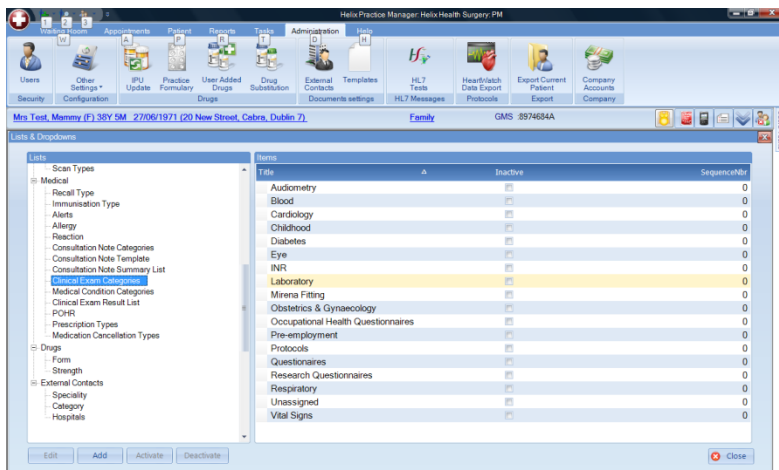
The Exam module in the Health Summary details the patient's medical and physical examinations. The User can set up exams to match the particular needs of the practice.

Setting Up Exams in HPM

Clinical Exam Categories

Within the exams section it is possible to group a set of exams into a category, e.g. gynaecology, biochemistry etc. These categories must be set up in Administration first.

1. Click on the Administration tab
2. Click on Other Settings and then lists an drop downs
3. Click on Clinical Exam Categories

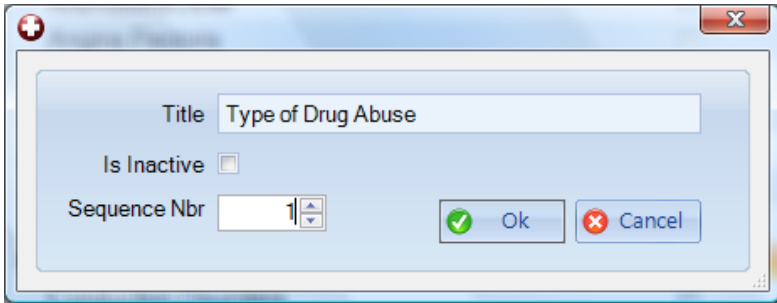


4. From this screen you can add, edit or activate/deactivate a category.

Clinical Exam Results List

The clinical exam result list is where you can add or edit results lists for use in tests which will then be included in exams.

1. Click on Add or Edit
2. Enter the name of the test
3. You can also enter a sequence number here. This will determine where it comes on the list.



HPM User Manual Version 2.6
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Title

Is Inactive ☐

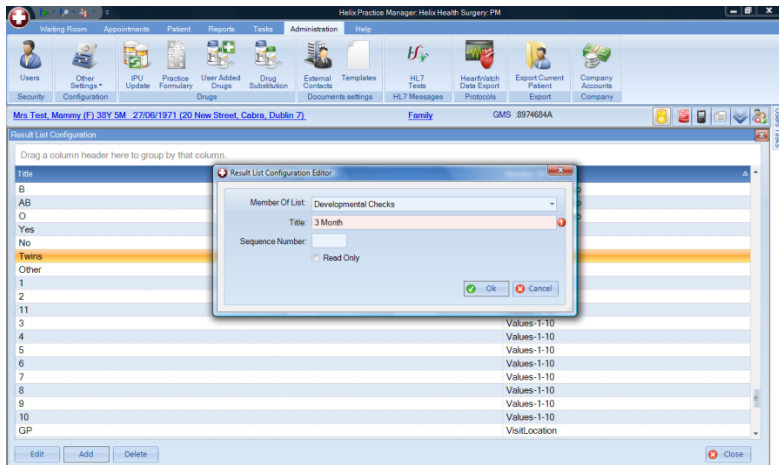
Sequence Nbr

Result List Configuration

Once you have edited the Clinical Exams Results list you can now set up the Result List Configuration. Essentially what you are doing here is creating a test which will have groups of information in it. I.e. a cervical smear test will have a number of results; pregnancy would have to be entered as 42 results as it needs information for up to 42 weeks.

1. Click on Administration
2. Click on Other Settings
3. Click Exams and Tests and then Result List Configuration
4. Click on Add

5. Enter from the drop down list – member of e.g. developmental checks
6. Enter title – in this case 3 month check



7. Enter sequence number if required and click OK
8. Click Add again and enter 6 month check etc.
9. Continue until you have entered all developmental checks

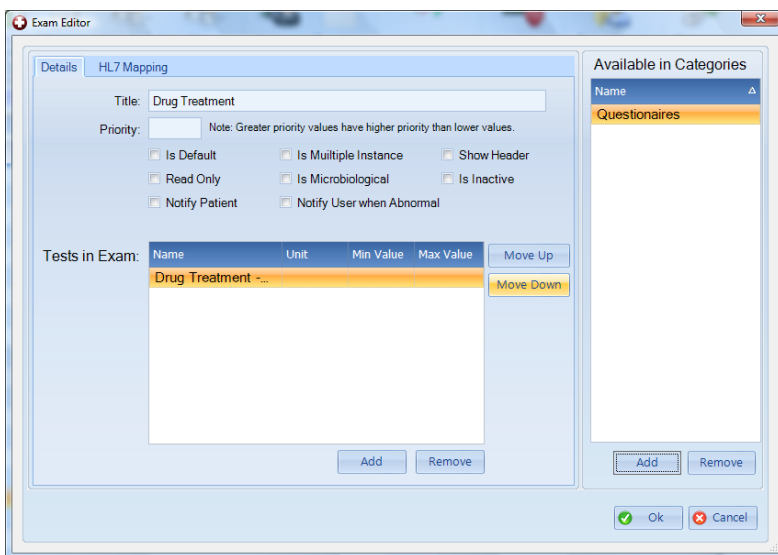
Test Configuration

You are now ready to set up your tests.

1. Click on Other Settings – Exams and Tests
2. Click on Test Configuration
3. Click on Add – Enter title, description
4. Result Type – This is where you can enter how the information is put in

Setting Up an Exam in HPM

1. In Administration click on Other Settings – Exams and Test and then Exam configuration.
2. To edit an exam simply click on Edit. Here you will see a list of tests associated with this exam. You can remove or add tests to the exam at this stage.
3. Name the Exam
4. Add exam into Category but clicking on Add on the right



5. To enter a new test click on Add
6. This will bring up the test screen where you can search for tests
7. Simply click on the relevant test and click OK to add to exam. Repeat as necessary

Entering an Exam on a Patient File

To enter a new exam into a patient record a consultation should have been started. The user can either click on

Exams icon at the top of the health summary or Exams box on the health summary itself.

Helix Practice Manager: Helix Health Surgery .pm

Waiting Room Appointments Patient Reports Tasks Administration Help

Search Add New Health Summary Consultation Notes Medication Immunisations Exams HL7 Messages Documents Sketch Accounts Finalise

Patients Consultation Clinical Documents Accounts Finalise

Miss test, Amy (F) 27Y 7M 03/01/1983 (Test Street, Swords, Family) GMS :1234567a -

Alerts: This Patient has more alerts, click on the 'Alerts' link to view all. Patient has aggressive tendencies, Patient has not paid bill ...
Drug Allergies: This Patient has more drug allergies, click on the 'Drug Allergies' link to view all. Distasteful Tabs 250mg Alliance 250mg ...
Other Allergies: No Known Allergies
Identifiers: Dr David Reidy

Health Summary Consultation History Patient History

Documents Add New
Referral Letter Joe Murphy 11/08/2010
Referral Letter with no Specialist 01/07/2010
Medical Certificate 17/06/2010
Referral Letter Paul Jones 17/06/2010
Long Term Medications on 17/06/... 17/06/2010
test 17/06/2010
Referral Letter Joe Murphy 17/06/2010
Maternity Claim on 17/06/2010 17/06/2010
Long Term Medications on 17/06/... 17/06/2010

Long Term Medication Add New
12/11/2010 Difene Dr Caps 75mg Diclofenac...
10/09/2010 Aspirin 75mg Lactose Free Caps ...
10/09/2010 Glucophage Tabs 500mg one To ...
10/09/2010 Stilnoct 10mg Tabs Eurodrug On...

Consultation Notes Add New
PM General Vaccination: 11/08/2010 12:46
PM General 11/08/2010 10:04
jkl
PM General 11/08/2010 10:03
bp 142/76
PM General 11/08/2010 09:47
est
PM General 11/08/2010 09:30
Prescription review: uiookmokm, iokm

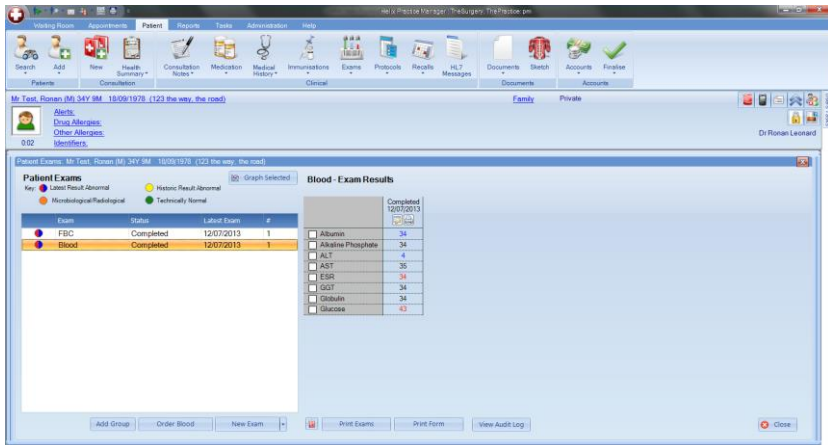
Tests New Vital Signs Add New
Title (Most Recent Date) Current Previous
Height(17/06/2010) 120.00 -30.23%
BMI(17/06/2010) 38.89 51.38%
Weight(17/06/2010) 56.00 -26.32%
Pulse(14/06/2010) 140.00
Smoking(17/06/2010) True
Alcohol(17/06/2010) 5

Medical History Add New
11/08/2010
ytfnyrtgvytyug
01/07/2010 (N18.0)End-stage renal disease
test rwenewek
17/06/2010 (K84)HEART DISEASE OTHER
17/06/2010 (R96)ASTHMA
14/06/2010 (L96)OSTEOPOROSIS
14/06/2010 (I15.4)Pneumonia due to other ...
14/06/2010 (I26.0)DIABETES, NONINSULIN DEP...

Recall Opportunities Add New
Mammography (Appointment Made) 07/08/2010
Diabetes Check Up (Not Notified Yet) 03/01/1983
Flu Vaccine (Not Notified Yet) 03/01/1983
INR (Not Notified Yet) 17/06/2011
Cervical Smear (Not Notified Yet) 15/06/2012
Last Result:P2: Negative/NAD (16/12/2009)

This will bring you into the examination screen.

Click on an exam name to read the results of the exam.



Add New Exam

There are two ways to add an exam; click on New Exam at the bottom of the screen.

- Click on 'Order Exam (Awaiting)' for any exams that you are sending away. E.g. FBC, T4, etc. This shows that the exam has been sent away and you are awaiting the outcome from Healthlink or otherwise.
- Click on 'Add Exam' for all exams that are carried out in the practice. E.g. vital signs, well woman, etc.

Patient Exams: Mr Test, Ronan (M) 34Y 9M 18/09/1978 (123 the way, the road)

Patient Exams

Key: ● Latest Result Abnormal ● Historic Result Abnormal
● Microbiological/Radiological ● Technically Normal

[Graph Selected](#)

Blood - Exam Results

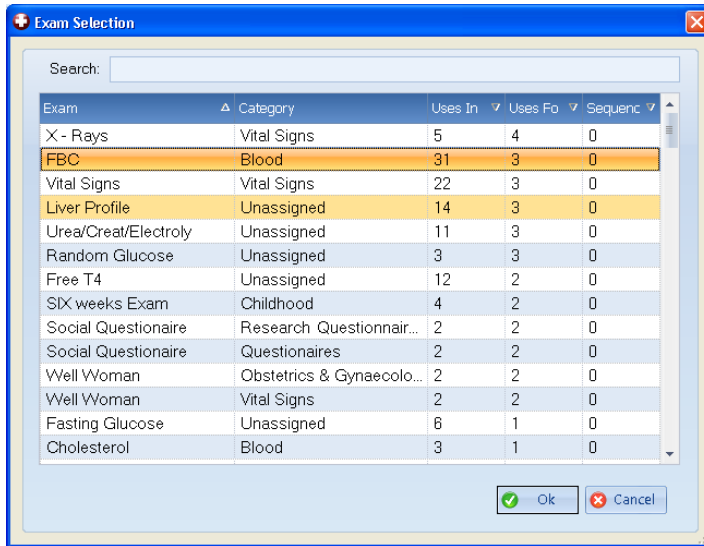
Exam	Status	Latest Exam	#
● FBC	Completed	12/07/2013	1
● Blood	Completed	12/07/2013	1

	Completed 12/07/2013
<input type="checkbox"/> Albumin	34
<input type="checkbox"/> Alkaline Phosphate	34
<input type="checkbox"/> ALT	4
<input type="checkbox"/> AST	35
<input type="checkbox"/> ESR	34
<input type="checkbox"/> GGT	34
<input type="checkbox"/> Globulin	34
<input type="checkbox"/> Glucose	43

[Add Group](#) [Order Blood](#) [New Exam](#) [Print Exams](#)

New Exam
Order Exam(awaiting)

When you click on New Exam the following screen will appear



This is a listing of all exams in the practice. Each exam has the following headings

- Exam – the name of the exam
- Category – you can sort exams into categories
- Uses In – This will list how many times this exam has been used in the practice
- Uses For – This will list how many times this particular patient has had this exam
- Sequence – this is the sequence of the exams

Select the Exam you want to use and click OK. The exam will open as seen below:

Mr Test, Another (F) 41Y 6M - 27/09/1971 (20 New Street, Kildare, Co. Kildare)

Vitamin B12 [25/04/2013]

Status: Entered By: Override Outcome:

Collected Date: Received Date: Reported Date:

Sample Number: Order Number: Sample Source:

Clinical Notes:

Notes:

Tests Hospital View

Test Name	Result	Comment	Status	Unit	Lower	Upper	Reported Date	Result Type
Vitamin B12	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	0.00	<input type="text"/>	<input type="text"/>

If you are entering a new exam fill in the Results as needed. The status of the exam will default to Completed. Once you have completed the exam click OK to save the results. You can also click on add on the bottom left of the screen, this will add an additional exam if you wish.

View Exam Results

To view an exam, simply click on the name of the exam. If there are multiple records for the same exam they will appear in date range and also will display the status, awaiting, completed or notify patient. A key also displays whether they are abnormal or not, or historically abnormal, in addition to indicating if they are microbiological/radiological.

Patient Exams: Mr Test, Ronan (M) 34Y 9M 18/09/1978 (123 the way, the road)


Patient Exams

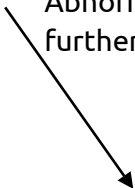
Key: ● Latest Result Abnormal ● Historic Result Abnormal
● Microbiological/Radiological ● Technically Normal

Exam	Status	Latest Exam	#
● FBC	Completed	12/07/2013	2
● Blood	Completed	12/07/2013	1

FBC - Exam Results

	Completed 12/07/2013	Completed 12/07/2013
<input type="checkbox"/> Hgb	12	2
<input type="checkbox"/> RBC	12	3
<input type="checkbox"/> MCV	12	45
<input type="checkbox"/> WBC	12	65
<input type="checkbox"/> PLTS	34	56
<input type="checkbox"/> ESR	34	65

To open a specific exam, click on the Edit icon below the date of the exam . The following screen will open. Abnormal results are displayed in red. You can also enter further details if required in this area.



Exam Details

Liver Profile [17/02/2009]

Status: Completed Entered By: Override Outcome: Reported Date: 21/02/2009

Collected Date: 23/01/2009 Received Date: Order Number: Sample Source:

Clinical Notes:

Notes:

Test Name	Result	Comment	Status	Unit	Lower	Upper	Reported Date	Result Type
AST	37			IU/L	7.00	40.00	23/01/2009	
Gamma-GT	93		Above...	IU/L	10.00	55.00	23/01/2009	
Albumin	48			g/L	35.00	50.00	23/01/2009	
LDH	288			IU/L	230.00	450.00	23/01/2009	
Total Protein	82		Above...	g/L	60.00	80.00	23/01/2009	
Total Bilirubin	12			umol/L	0.00	17.00	23/01/2009	
Alkaline Phosphate	74			IU/L	40.00	129.00	23/01/2009	

Delete Ok Cancel

If you wish to view the result in HL7 or hospital format, click on the Hospital View tab

Exam Details

Liver Profile [17/02/2009]

Status: Completed Entered By: Override Outcome: Reported Date: 21/02/2009

Collected Date: 23/01/2009 Received Date: Order Number: Sample Source:

Clinical Notes:

Notes:

Liver Profile

Total Protein	82	g/L	60-80	H
Albumin	48	g/L	35-50	
Total Bilirubin	12	umol/L	0-17	
Alkaline Phosphate	74	IU/L	40-129	
Gamma-GT	93	IU/L	10-55	H
AST	37	IU/L	7-40	
LDH	288	IU/L	230-450	

Urea/Creat/Electroly

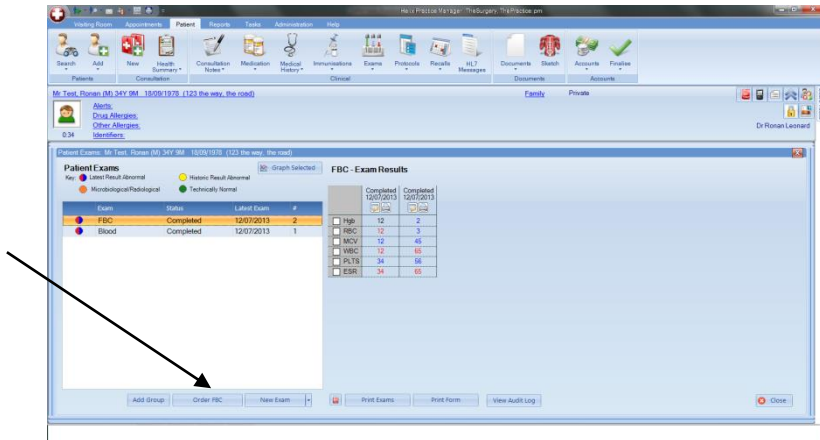
Urea	7.5	mmol/L	3.0-7.0	H
Sodium	139	mmol/L	135-145	
Potassium	4.3	mmol/L	3.5-5.0	
Creatinine	96	umol/L	62-106	

Delete Ok Cancel

Ordering a new Exam from existing exams

If you wish to order a new exam from one already in the patients chart, click on the relevant exam. When this is highlighted the box on the bottom of the screen will

change to order new exam or if the exam is marked as awaiting it will read 'enter results for Exam.



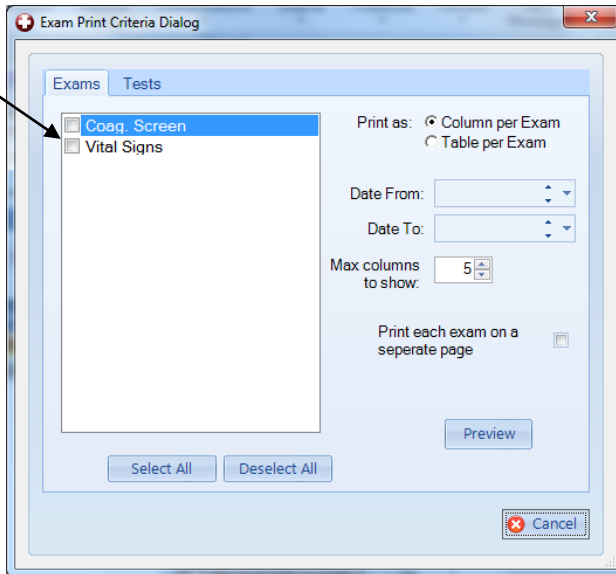
You can choose the exams that will appear on the patient summary screen. Exams such as vital signs can be displayed here so that they can be monitored easily. The change in results since the last visit will also show up here.

The screenshot displays the HPM User Manual interface. At the top, there is a navigation bar with icons for Search, Add, New, History, Health Summary, Consultation Notes, Medication, Medical History, Immunizations, Exams, Protocols, Recalls, HL7 Messages, Documents, Sketch, and Accounts. Below this, a patient profile for 'Test, Tester (Female) 23/07/1979 28Y 8M (Tester, Tester)' is shown. The main content area is divided into several sections: 'Consultation History' (listing various consultations), 'Long Term Medication' (with an 'Add New' link), 'Consultation Notes' (dated 07/01/2009), 'Exams' (with a table of exam results), 'Medical History' (with an 'Add New' link), and 'Recall Opportunities' (listing 'Cervical Smear (Not Notified Yet)'). A black arrow points to the 'Exams' icon in the left sidebar.

Exam	Current	Change
Height	130.00 (0Y 0M ago)	0 (n 0 days)
Weight	125.00 (0Y 0M ago)	5 (n 0 days)

Printing Exams

You can print exam results using the Print Exams button.
You will see the screen below:



There are two tabs, Exams and Tests. Use the Tests tab if you only want to print certain tests.

In the exams tab, choose the Exams you want to print using the tick boxes, or click Select All to choose all exams.

Exams can now be printed in a new grid format. There are two options:

1. Print as Column per exam – This option will print each exam with a series of columns for each date that exam was done. E.g.; Exam: FBC

Print Exams

Helix Health Medical Centre, Helix Health Medical Centre, Tallaght, Dublin 24

Patient: Bloggs, Joe
Address: Manchester City, Manchester, England
DOB: 12/10/2010

Cholesterol

	18/11/2010 (Awaiting)	18/11/2010 (Completed)	18/10/2010 (Completed)	18/09/2010 (Completed)	18/08/2010 (Completed)
Cholesterol	6	7	8	7	9

Print Cancel

2. Print as Table per Exam – This will print each exam instance in a separate table.

Print Exams

Helix Health Medical Centre, Helix Health Medical Centre, Tallaght, Dublin 24

CHOLESTEROL

Patient: Bloggs, Joe
Status: Completed
Collected On: 18/10/2010
Sample Num:
Clinical Notes:
Practice: Tallaght, Dublin 24
Address:
Notes:

Address: Manchester City, Manchester, England
Entered By: PM
Recieved On:
Order Num:

DOB: 12/10/2010
Reported On:
Source:

Test Results

Test	Result	Unit	Comment	Status	Lower	Upper	Date
Cholesterol	8				3.00	6.00	18/11/2010

CHOLESTEROL

Patient: Bloggs, Joe
Status: Awaiting
Collected On:
Sample Num:
Clinical Notes:
Practice: Tallaght, Dublin 24
Address:
Notes:

Address: Manchester City, Manchester, England
Entered By: PM
Recieved On:
Order Num:

DOB: 12/10/2010
Reported On:
Source:

Print Cancel

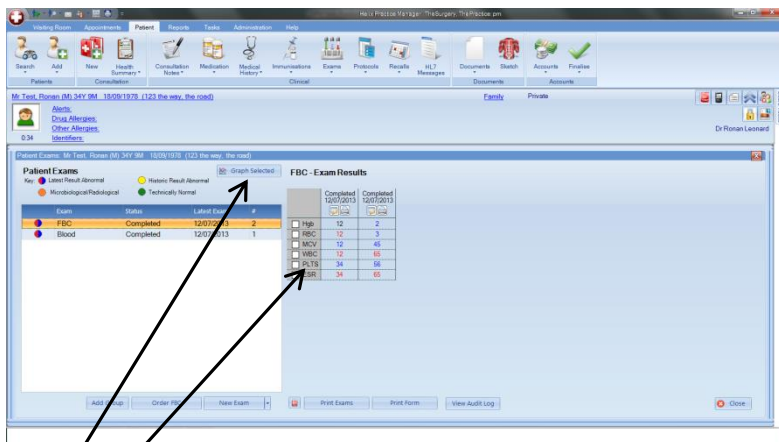
Choose the dates you want to print from.

You can order the list by Exams name or by date.

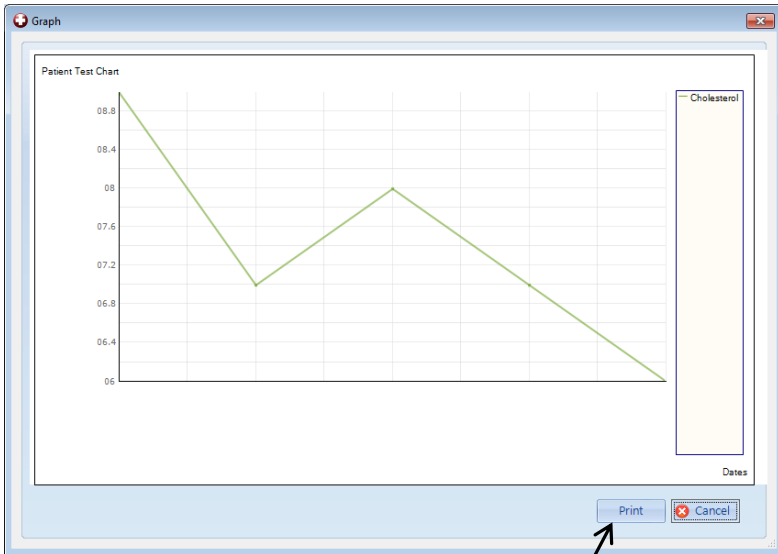
If you want to print one exam per page, tick the relevant box.

Click Preview to see the exams, and then click print on this screen.

Graph an Exam



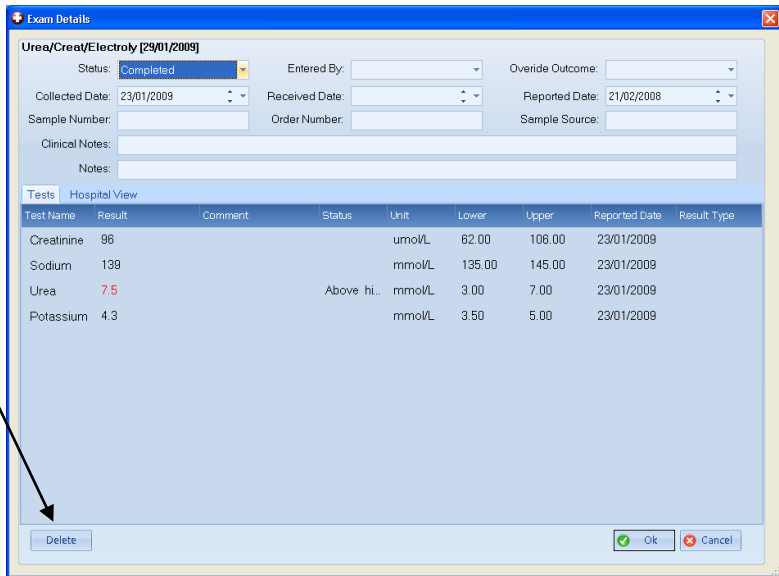
Place a tick against the Exam you wish to graph and select Graph Selected.



The graph can then be printed using the Print button.

Deleting an Exam

If an exam is entered in error and needs to be deleted, open the exam and go to the details view. There is a delete button at the bottom of the screen that allows you to do this.



Exam Details

Urea/Creat/Electroly [29/01/2009]

Status: **Completed** Entered By: Override Outcome:

Collected Date: 23/01/2009 Received Date: Reported Date: 21/02/2008

Sample Number: Order Number: Sample Source:

Clinical Notes:

Notes:

Tests Hospital View

Test Name	Result	Comment	Status	Unit	Lower	Upper	Reported Date	Result Type
Creatinine	96			umol/L	62.00	106.00	23/01/2009	
Sodium	139			mmol/L	135.00	145.00	23/01/2009	
Urea	7.5		Above hi..	mmol/L	3.00	7.00	23/01/2009	
Potassium	4.3			mmol/L	3.50	5.00	23/01/2009	

Delete Ok Cancel

Completing an exam

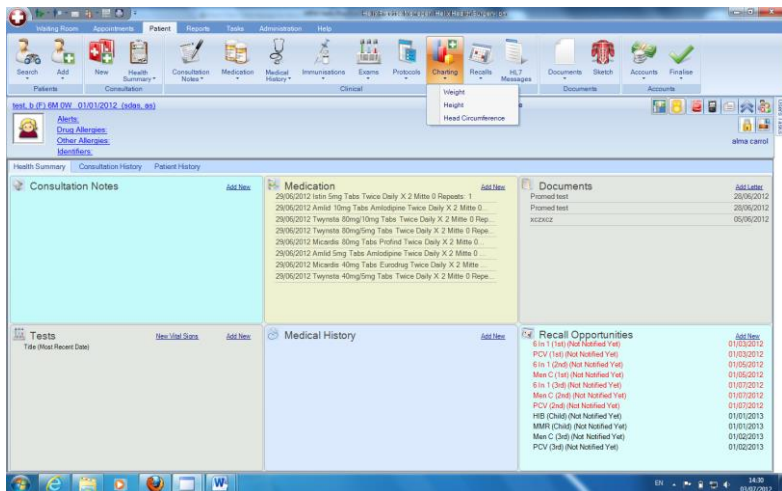
If an exam was marked as 'Awaiting' and you now have the result back, you need to record the result and mark it as completed.

Go to the exams section of the patient summary screen, and open the detailed view of the exam. There is a drop down list here with a number of options, select completed. Fill in the results in the relevant fields.

Note: If you are downloading results directly from a hospital you will not have to do this

Child Centile Charts

Within the patient demographics, there is an option for charting which allows a user to see centile charts for height, weight and head circumference. The height and weight values are automatically detected from the vital signs exam.



HL7 Messages

The HL7 is an International messaging standard which has been adopted nationally by the HEBE group and currently the North Western, North Eastern, South Eastern and Southern Health Boards are all developing or in the process of rolling out this 'end to end' messaging facility.

We have also incorporated Healthlink into the system. As hospitals come 'on-line' you will be able to download all results from that hospital. This system is currently free to users from the Department of Health and is applicable in Health Board areas where the local Health Board is not producing the HL7 message themselves.

*Application forms for Healthlink are available from
www.healthlink.ie or on 01-8304470*

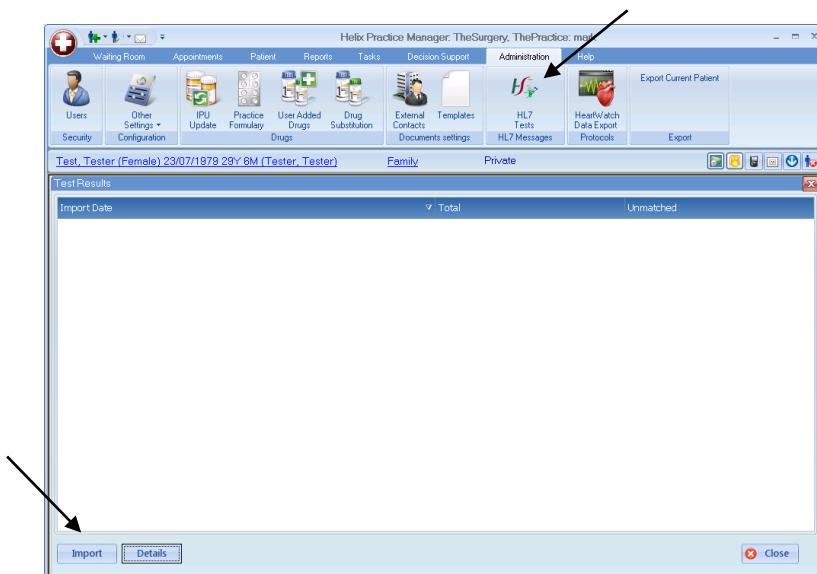
These are the two categories of providers. So you can contact Healthlink or your regional department of the HSE to find out how to set up your regional messaging. Although our system is set up to receive electronic lab results they are not provided by Helix Health.

Downloading HL7 Messages

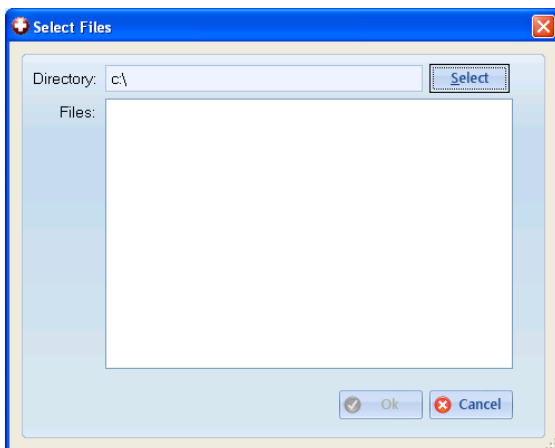
When you lab results come back, you will have to first download them onto your pc and save the file in a standard location which will be set up by Helix Health, usually C:\HelixHealth\HL7Download.

The file will either come from Healthlink or your local message provider as mentioned above.

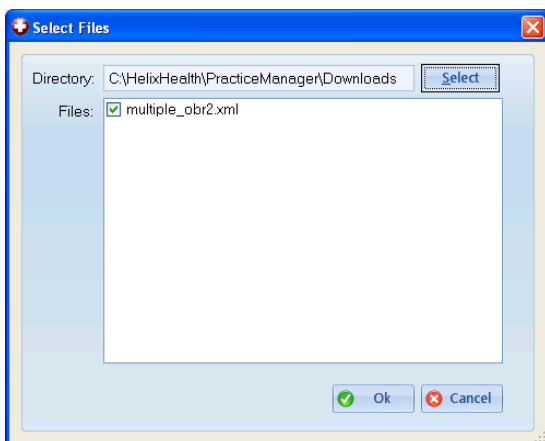
To input these messages into HPM, first go to Administration. There is an option here called HL7 Tests.



To import your lab results, click on the import button at the bottom of the screen.



To browse to the correct location of your file click Select, and browse to the location of the file you have downloaded with your lab results.

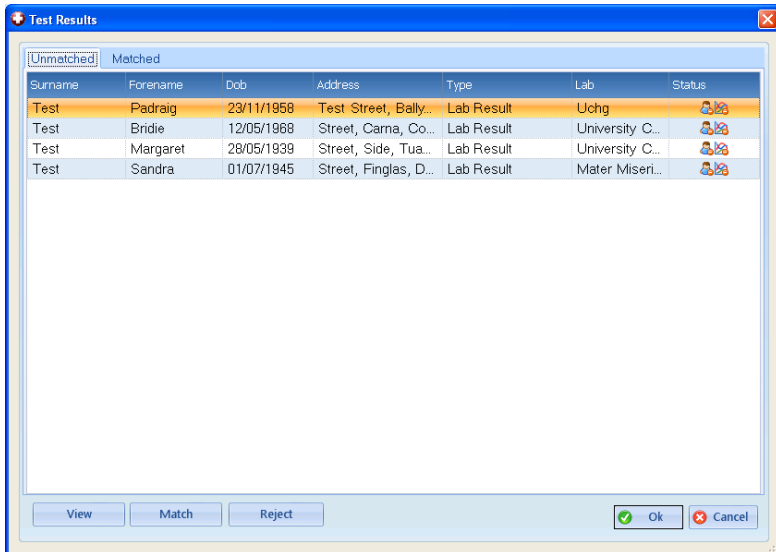


Note: you will only have to browse to this location once. After that it will automatically find the same location, so you will only have to make sure the Tick is on today's file and click OK.

Click OK to download the file. (This may take a minute or two depending on how many results there are).

NOTE: If you are using Healthlink to import your lab results, the import button can be configured to automatically retrieve new results from the Healthlink Website. This means you would not need to download your messages first from the site, this would be done automatically.

A list of the results will open when the download is complete.



There are two Tabs at the top of this screen. The Unmatched tab shows all of the results where the patient and/or the test name need to be matched to those in the system.

The second tab, Matched, shows all the patients and tests that are already matched. The more times you go through this processes, the less patients and tests you will need to match up.

Viewing Results

You can view the results of the exams from here. This may help you when trying to match up patients. If you highlight the exam you want to view and click View, the result will open in the HL7 format.

The screenshot shows a 'Test Result' window with a blue title bar. Inside, there's a 'Requested by Clinician:' dropdown. The main content is titled 'Final results'. It displays patient details: Name: GABRIEL Test, Date of Birth: 13/05/1941, Address: Test Address, Number: Z02586982, GP: MichaelHaddon, Gender: M, Location: . Below this, 'Clinical Info: DIZZINESS' and 'Sample Source: Serum' are shown. A horizontal line separates this from a row of dates: Specimen Number: E,08.0000816.L, Collection Date: 04/01/2008, Received: 04/01/2008, Report Date: 07/01/2008. Another horizontal line follows. The test results are listed: 'FREE T4' with a value of 12.0 pmol/L and a range of 9.0-21.0; and 'TSH' with a value of 1.75 mU/L and a range of 0.45-3.50. A note at the bottom states: 'Please send clotted(Red top) sample for TFTs and other Endocrinology tests except Renin/ACTH'. At the very bottom, there are 'Print', 'Ok', and 'Cancel' buttons.

Requested by Clinician: [dropdown]

Final results

Name: GABRIEL Test
Date of Birth: 13/05/1941
Address: Test Address

Number: Z02586982
GP: MichaelHaddon
Gender: M
Location:

Clinical Info: DIZZINESS
Sample Source: Serum

Specimen Number: E,08.0000816.L Collection Date: 04/01/2008 Received: 04/01/2008 Report Date: 07/01/2008

FREE T4

FREE T4 12.0 pmol / L 9.0-21.0

TSH

TSH 1.75 mU/L 0.45-3.50

Please send clotted(Red top) sample for TFTs and other Endocrinology tests except Renin/ACTH

Print [Ok] [Cancel]

You can print the result using the Print option at the bottom of this screen.

Matching Patients and Tests

In the Unmatched tab you will see the patients name, date of birth, address, the test type, the lab where the result has come from and the status of the result. There are two icons which can appear in the status –



Patient Unmatched – The patient details need to be matched to the patient in your system



Test Unmatched – The name of the test result needs to be matched to a test in your own exams.

To match an unmatched patient and test, highlight the result and click Match

The patient search comes up first. The date of birth will automatically be entered in the search to find the matching patient. You can enter in other search criteria if needed such as name, GMS number, etc.

The screenshot shows a 'Patient Search' window with the following fields and results:

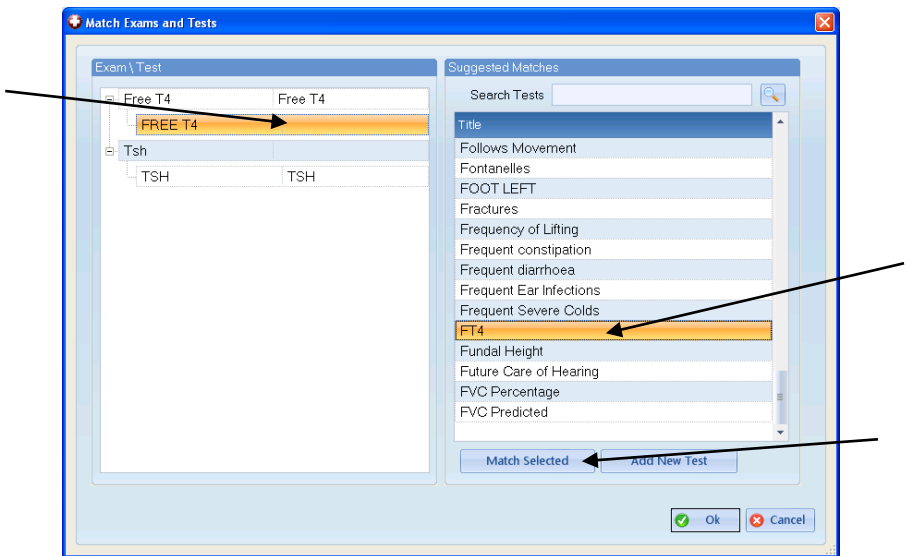
- Search criteria: 01/07/1945 (Date of Birth)
- Buttons: Search, Refresh
- Form fields: Surname, First Name, Date of Birth (01/07/1945), GMS Number, and a link for 'Show advanced search'.
- Results table:

Surname	First Name	Address	Date Of Birth	Reg Number
Test	Tester	Tester, Tester	01/07/1945	11179

At the bottom of the window are buttons for 'Add', 'Edit', 'Ok', and 'Cancel'.

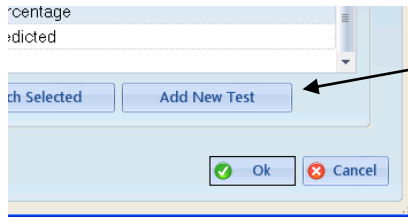
Select the correct patient and click OK. This ensures that the correct result goes to the correct patient. Once a patient is matched up once, they should not need matching again the next time they receive results.

The match test screen opens next if the test is also unmatched. The Exam and the test(s) within that exam need to be matched up. Click on the name of the exam on the left of the screen and a list of matching exams will appear in a list on the right hand side. Click on the matching exam and click Match Selected.



Repeat this process for the tests.

If there are no matching exams or tests there, click Add New Exam to create a new exam or Add New Test to create a new test.



Again, once you match an exam once you will not need to match it again next time.

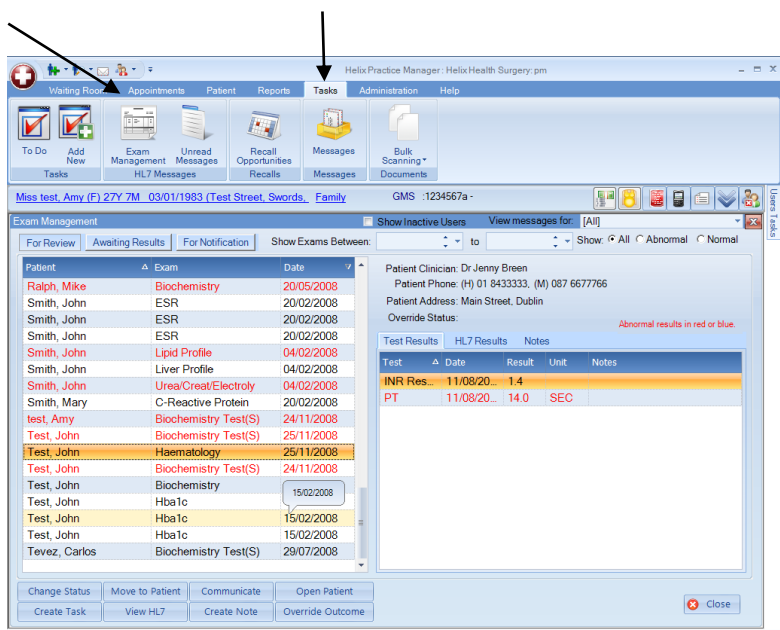
Rejecting Results

There may be times when you are sent results for patients who are not in your practice and have been sent to you in error. You can remove these results by highlighting the result and clicking Reject.

Exam Management

Once your exams have been matched up to the correct patients, you can review all your results. They can be mark for further action, marked as completed or printed.

To view your exam results, click on the Tasks tab in the top menu bar and then click on Exam Management.



The exam results belonging to the user/doctor that is logged into the system will be displayed automatically. You can view other users or all users by clicking the drop down menu on the right hand side.

There are three lists of exams here:

1. For Review – these are exams that are received and matched but not reviewed yet. They have not been marked as complete yet.
2. Awaiting results – When an exam is taken and recorded as awaiting results in the patients file, they appear in here.
3. For Notification – Results that are reviewed but you do not want them to be marked complete appear here. For notification could mean you wish to contact the patient to speak to them about the result.

In each of the above sections you can see the patient name, the exam name and the date of the result. Click on a result to see the result details in the box on the right hand side. Abnormal results are highlighted in red.

From this screen you can decide what you wish to do with the exam. The options are:

1. Change Status – from here you can mark an exam as completed, for review or notification or back to awaiting results
2. Move to patient which will move the exam to another patient if entered in error
3. Open Patient – which will open the patient summary screen
4. Create Task – you can create a follow up task for this exam
5. View HL7 which opens the Lab view of the exam
6. Create Note – Creates a consultation note in the patients file

7. Override Outcome – where you can manually override the results

You can filter the results by date by entering a To and From date in the date fields.

You can also choose to only see only the abnormal results or only the normal results using the buttons here:

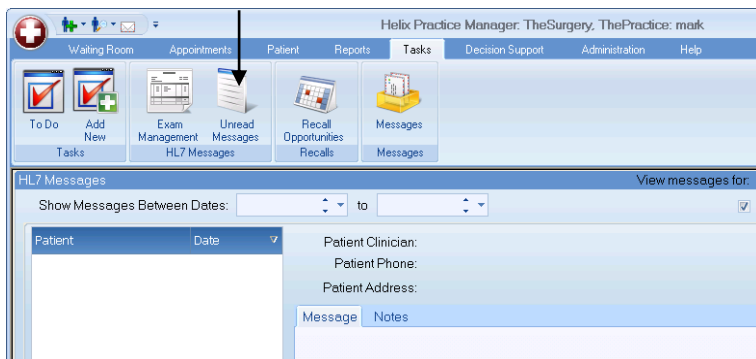
Show: ☒ All ☐ Abnormal ☐ Normal

HL7 Messages

When you download HL7 results file, there may also be in this file some hospital messages regarding patients. Such as death notices, discharge summaries, A&E notifications, etc.

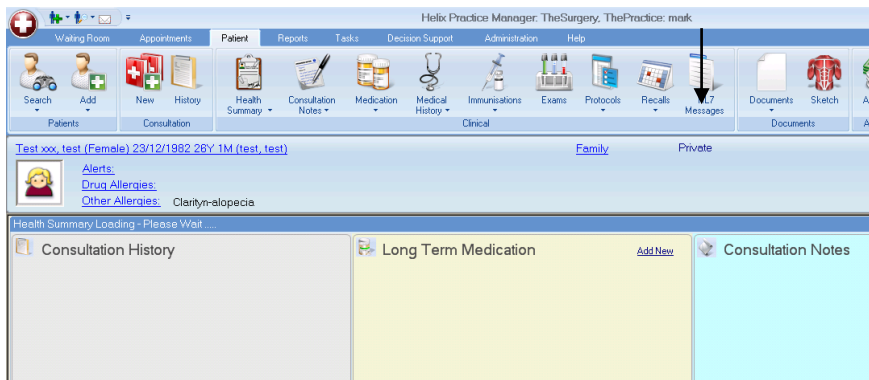
These messages are matched up to patients in the same way as lab results. However, once they are matched up they do not go to the Exam Management section of Tasks, they go to a separate section in Tasks called Unread Messages





You can view the list of messages here, and mark them as read when you have checked them. Once a message is marked as read it goes into the patient's file.

To view HL7 messages in the patients file, open the patient and click on HL7 Messages.



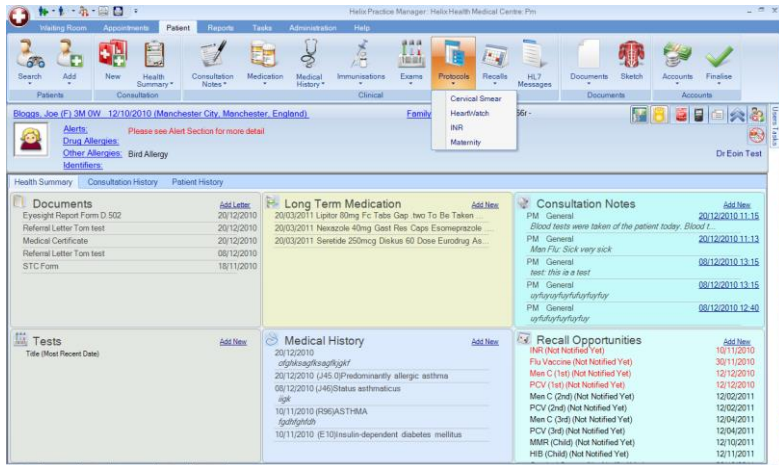
Protocols

The Protocols section in the patient's summary contains Cervical Smears, Heartwatch, INR and Maternity.

Cervical Smears

To record details of a Cervical Smear, open the patient's chart and click on the Protocols button. You will see a drop down list with 4 options, Cervical Smear, HeartWatch, INR and Maternity. Choose cervical smear.





Adding a Smear

To add in a new record of a smear taken, click the ADD button. Then fill in the details of the smear:

- Date Of Smear
- Date Of LMP
- Status – When a smear is first taken, you can mark the status as awaiting and once it is completed it can be changed to reflect this.
- Observations – this is a free text box to add in notes at the time the smear has been taken.
- REF – This is the number on the result from the lab
- Date of result – The date the result was received
- Result – There is a standard list of possible results in this drop down list.
- ICSP – Tick this box if this smear is part of the National Cervical Screening Program

- Duration to Next - The 'date of next' smear is updated based on what length of time is selected in 'duration to next'.
- Date next smear – The date the patient will be due her next smear test.
- Smear Comment
- Referred to Colposcopy

The screenshot displays the Helix Practice Manager interface. At the top, there's a navigation bar with tabs: Waiting Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below this is a toolbar with icons for Search, Add, New, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Recalls, and HL7 Messages. The main content area shows patient details for 'Miss test, Amy (F) 27Y 7M' with contact information. Below this, there are links for Alerts, Drug Allergies, Other Allergies, and Identifiers. The 'Cervical Smear Miss test, Amy (F) 27Y 7M' form is visible, containing fields for Date Of Smear, Status, Observation, Reference number, Date Of Result, Result, ICSP, and Duration To Next. The form is currently set to 'Awaiting' status with a 'test test' observation. At the bottom, there are buttons for 'Add', 'Print Details', and 'Print Cytology'.

Date Of Smear:	15/06/2010	01/12/2009
Status:	Awaiting	Completed
Observation:		test test
Reference number:		1111111
Date Of Result:		16/12/2009
Result:		P2: Negative/NAD
ICSP:	<input type="checkbox"/>	<input type="checkbox"/>
Duration To Next:	2 Years	6 Months

You can choose to stop the patient showing up in any smear recalls by clicking Stop Recall.

You can also print the details of the patients smear history or print the cytology form from here.

HeartWatch

HeartWatch is the name for the national programme in general practice for the initial phase of secondary prevention of cardiovascular disease.

To record information in to the HeartWatch Protocol, open the patient's chart and click on the Protocols button. You will see a drop down list with 4 options, Cervical Smear, HeartWatch, INR and Maternity, choose HeartWatch.



Adding a record


To create a new Heartwatch record click .

You will see the screen below:

The screenshot displays the Helix Practice Manager software interface. The top menu bar includes options like Waiting Room, Appointments, Patient, Reports, Tasks, Decision Support, Administration, and Help. Below the menu is a toolbar with icons for Search, Add, New, History, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Recall, HL7 Messages, Documents, Sketch, and Accounts. The main window shows a patient record for 'Test, Tester (Female) 01/07/1975 33Yr FM (Tester, Tester)'. The 'Heartwatch Protocol' form is open, with tabs for Registration Details, Patient History, Diabetes Details, Cardiac Medications, Referrals / Attended, and Consent. The 'Registration Details' tab is active, showing fields for Patient Heartwatch ID (N/A), Heartwatch GP, and Date (09/01/2009). The 'Employment' section includes fields for Occupation, Employment Status, and a dropdown for 'Acres if Farmer?'. The 'CVD Family History' section has radio buttons for '1 Relative <55m', '1 Relative <65', 'None Significant', and 'Unknown'. The 'Exclusion Criteria' section lists several conditions with checkboxes, and the 'Qualifying Criteria' section includes a dropdown for 'Qualifying Event' and a 'Date' field. The form has 'Add', 'Delete', and 'Close' buttons at the bottom.

The different types of records are lists on the left hand side:

- Registration – Start here and register all the patients details
- Continuing Care – Click here and then Add Visit when you want to add a Heartwatch visit to the patients file.
- Events – Click on events and Add new Event to record different events that happen during the Heartwatch programme.


The fields to be filled in will appear on the right. Mandatory fields will appear with a red  beside it.

Submitting the File

At the end of the month you can export a file of all the events for the month. It includes files that contain all the new registration records, all the events and all the visits for the month.

Go to administration and click on HeartWatch Data Export



Select the year and the month you want to export and click .

Select the location for the file where you will be able to find it and click OK.



INR

To record information in to the INR Protocol, open the patient's chart and click on the Protocols button. You will see a drop down list with 4 options, Cervical Smear, HeartWatch, INR and Maternity, choose INR.



Select Add to add the latest INR details

A screenshot of the 'INR Bloggs, Joe (F) 3M CW 12/10/2010 (Manchester City, Manchester, England)' form. The form is divided into two main sections: 'Info' on the left and 'Details' on the right. The 'Info' section contains fields for 'Duration:', 'Range:', and 'Diagnosis:'. The 'Details' section contains fields for 'Date Of INR:' (17/01/2011), 'INR Result:', 'New Dose:', 'Duration to Next:', 'Date Of Next Draw:', 'Comment:', and a status dropdown menu currently set to 'Awaiting'. There is a 'Delete' button below the status dropdown. At the bottom of the form, there are buttons for 'Add', 'Print Details', and 'Close'.

The following fields need to be filled in

- INR Result
- New Dose
- Duration to Next
- Date of Next Draw
- Comment
- Status

The INR details can be printed by selecting the Print Details button.

Maternity

To record information in to the Maternity Protocol, open the patient's chart and click on the Protocols button. You will see a drop down list with 4 options, Cervical Smear, HeartWatch, INR and Maternity, choose Maternity.



All details of a patient's pregnancy are held in this section, from the initial visit, through all the visits throughout the pregnancy, to the post natal details.

To enter a new pregnancy, click protocols, then Maternity. You will see four tabs at the top of the screen:

- Initial Visit
- Obstetrician
- Visits
- Outcome

In the column on the right hand side you will see a list of dates each date signifies a different pregnancy. The date is the date of the initial visit.

Adding a record

To start a new pregnancy record, click on Add New Pregnancy.

The Initial visit tab will be populated with a number of different fields to be filled in.


The screenshot displays the Helix Practice Manager software interface. The top menu bar includes options like Working Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below the menu is a toolbar with icons for Search, Add, New, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Recalls, HL7 Messages, Documents, Sketch, Accounts, and Finalise. The main window shows a patient record for Miss test, Amy (F) 27Y 7M, 03/01/1983 (Test Street, Swords, Co.Dublin) 087 6566666. The 'Initial Visit' tab is active, showing fields for Initial Visit Date (11/08/2010), LMP (26/07/2010), EDD (03/05/2011), and Ultrasound Date (17/08/2010). The 'Mothers Details' section includes checkboxes for Mother Smokes, First Pregnancy, and Multiple Pregnancy, along with fields for Live Births, Still Births, Miscarriages, Gravida, Para, and Intends To Breastfeed. The 'Clinical Details' section has a field for General Notes (test maternity notes xxxxxx). The bottom of the screen shows buttons for Add New Pregnancy, Delete Pregnancy, Add New Visit, Maternity Summary, Claim Form, and a Close button.

Fill in the details by scrolling down to the bottom of the screen.

Note: if you enter an LMP the EDD will be calculated automatically and if an EDD date is entered and the LMP is null it will subtract 40 weeks from the EDD date and use this to populate the LMP.

The next tab Obstetrician can also be filled in with the relevant information.

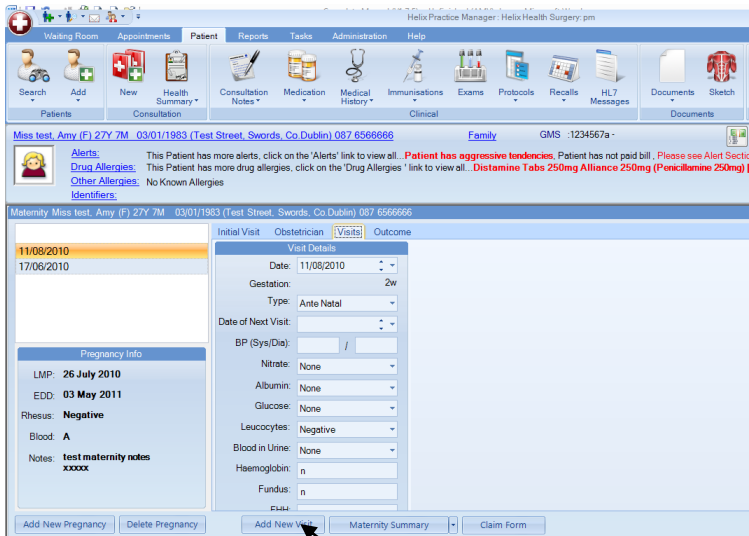
Once you have filled in all the details on screen, click Back to save the data.

A pregnancy icon  will appear on the patient's health summary screen. You can hold the mouse over this icon to see the EDD date of the pregnancy, or click on it to open the pregnancy details.

When making an appointment for a pregnant lady and alert will be displayed with the number of weeks gestation.

Visits

To record a new pregnancy visit, click Add New Visit.



The screenshot displays the Helix Practice Manager interface for a patient named Miss test, Amy (F) 27Y 7M, born 03/01/1983. The interface includes a top navigation bar with tabs for Waiting Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below this is a toolbar with icons for Search, Add, New, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Clinical, Exams, Protocols, Recalls, HL7 Messages, Documents, and Sketch. The main content area shows patient details, including a list of alerts (e.g., 'Patient has aggressive tendencies'), drug allergies, and other allergies. A 'Pregnancy Info' section is visible, showing LMP (26 July 2010), EDD (03 May 2011), Rhesus (Negative), Blood (A), and Notes (test maternity notes xxxxx). A 'Visits' tab is selected, showing a list of visits with columns for Date, Gestation, Type, and Date of Next Visit. The 'Add New Visit' button is highlighted with a black arrow.

Visit Details
Date: 11/08/2010
Gestation: 2w
Type: Ante Natal
Date of Next Visit:
BP (Sys/Dia): /
Nitrate: None
Albumin: None
Glucose: None
Leucocytes: Negative
Blood in Urine: None
Haemoglobin: n
Fundus: n

The Date and Gestation (in weeks) are entered automatically. The Type of visit will default to Ante Natal.

Fill in the other details as needed by scrolling to the end of the screen.

Outcome

Once the pregnancy is over you can fill in the outcome tab.

Helix Practice Manager: Helix Health Surgery: pm

Waiting Room Appointments Patient Reports Tasks Administration Help

Search Add New Health Summary Consultation Notes Medication Medical History Immunisations Exams Protocols Recalls HL7 Messages Documents Sketch Accounts Finalise

Patients Consultation Clinical Clinical Documents Accounts Finalise

Miss test, Amy (F) 27Y 7M 03/01/1983 (Test Street, Swords, Co.Dublin) 087 6566666 Family GMS :1234567a

Alerts: This Patient has more alerts, click on the 'Alerts' link to view all. Patient has aggressive tendencies. Patient has not paid bill. Please see Alert Section for more details...
Drug Allergies: This Patient has more drug allergies, click on the 'Drug Allergies' link to view all. Dexamethasone 250mg Alliance 250mg (Pencillamine 250mg) (TABS) (critical).
Other Allergies: No Known Allergies
Identifiers: Dr David R

Maternity Miss test, Amy (F) 27Y 7M 03/01/1983 (Test Street, Swords, Co.Dublin) 087 6566666

Initial Visit Obstetrician Visits Outcome

11/08/2010
17/06/2010

Pregnancy Info

LMP: 26 July 2010
EDD: 03 May 2011
Rhesus: Negative
Blood: A
Notes: test maternity notes
xxxxx

Delivery/Outcome Date: 18/08/2010 Type: Infant Location: Hospital Gestation: 39 weeks Family Planning Info: Feeding: Bottle Notes: Duration of Labour: Induced: Epidural: Puerperal Problems: Anti-D: Apgar 1 Minute: 4 Apgar 5 Minutes: 7 GP Attended: ☐ Miscarriage ☐ Abortion

Infant Details

Firstname	Surname	Sex	Weight	Head Circumference
Joey	Test	Male		

Add New Pregnancy Delete Pregnancy Add New Visit Maternity Summary Claim Form Close

Once the delivery date has been entered, the pregnancy is completed and the pregnancy icon will disappear from the patient health summary screen.

You can add the infant details here also. Scroll to the end of the screen and there is an Add Infant button.

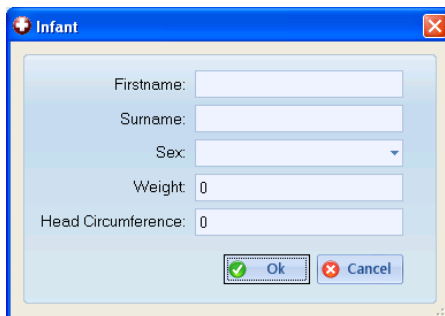


Firstname	Surname	Sex	Weight	Head Circumference
-----------	---------	-----	--------	--------------------

Buttons: Add Infant, Edit, Delete, Add To Patient Database

Bottom Buttons: Delete Pregnancy, Add New Visit, Maternity Service Claim, Close

Here you can enter in the infant's name, sex, weight, and head circumference.



Infant

Firstname:

Surname:

Sex:

Weight:

Head Circumference:

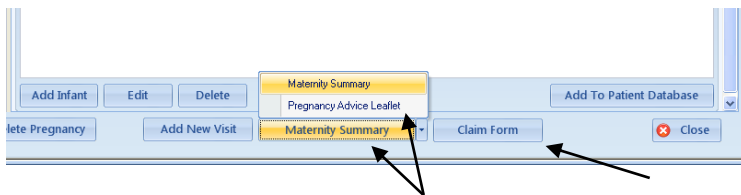
Buttons: Ok, Cancel

Once you have added the infant details it will ask you if you want to add the infant to the database. This will open the patient registration screen where the name of the baby and the mothers address will already be filled in.

Printing

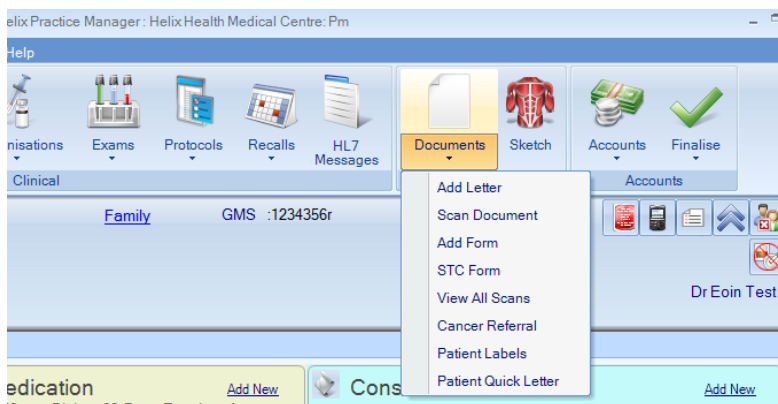
There are three print options in the main maternity section:

- Claim form – Used for claiming money back on maternity services
- Maternity Summary – Prints off a summary of the whole pregnancy
- Pregnancy Advice Leaflet – opens a pdf document of pregnancy advice.



To print one of these, use the drop down list beside Maternity Service Claim to choose which one you want to print, and then click that button to open up the document. Then simply click the print button to print it.

Documents

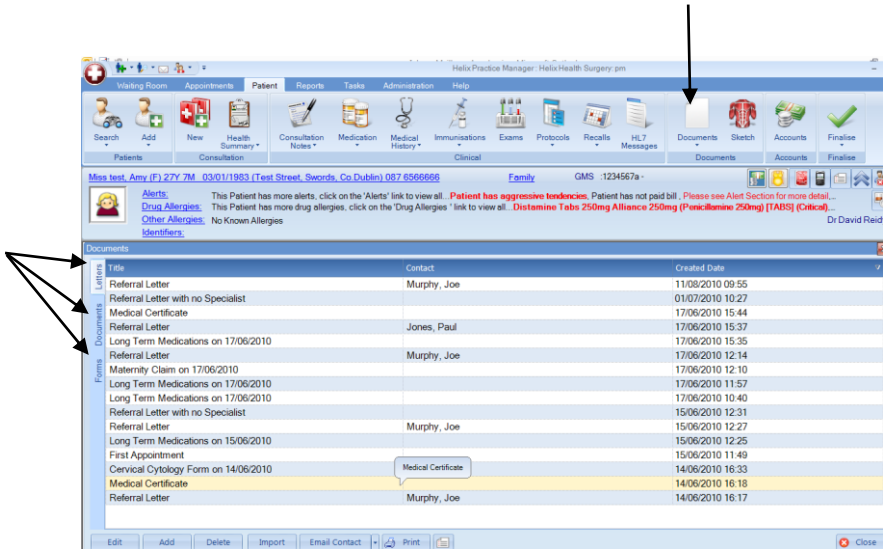


This section covers all documents relating to a patient, including letters, forms and scans, STC form, Cancer Referral, Patient Labels and Patient Quick Letter



To access the documents section, open a patient's chart and click on the documents button in the main ribbon.

There are three areas to choose from; letters, documents, and forms. To choose one of these areas, click on the corresponding tab on the right hand side of the screen.



Letters

This first section is where patient letters are composed. To add a new patient letter click the Add button. You will see the screen below.

You can Also do this by clicking Add Letter from the main summary screen.

- Use blank Template – If this box is ticks, a blank word document will open and you can write the whole letter yourself starting with a blank template.
- Template – Depending on which of the categories you choose a list of the letters in that category will appear here.
- Title – This is where you give the letter a name or title.
- Contact – Here you can add an external contact for the letter to be addressed to.

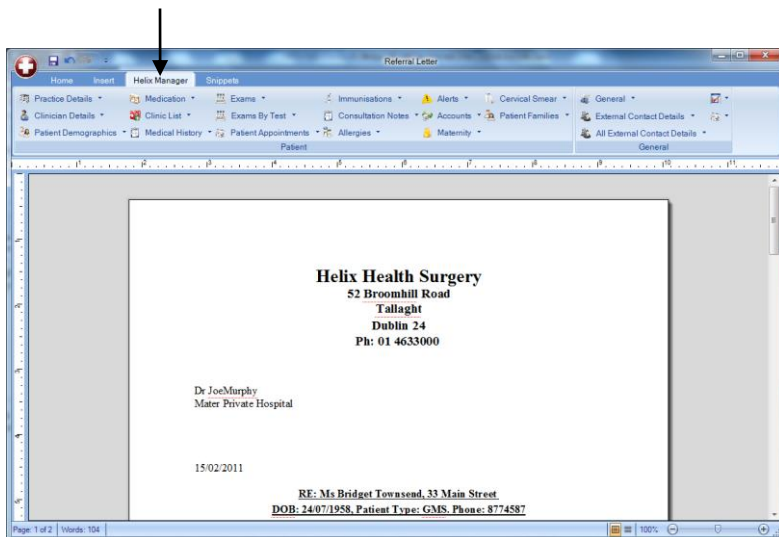
Once you have the letter you want to use selected, you can click OK to open the letter template in word or RTF (alternative word editor) where you can make any changes needed.

To edit the letter, simply free type as you would in a normal word document.

There are four Tabs at the top of the RTF Editor:

- Home – This contains basic text editing functions such as font, paragraph and page setup features.
- Insert – This tab contains options for Tables, images, headers and footers, etc.
- Practice Manager - This menu contains a list of demographics from your system
- Snippets – If you highlight a section of text, you can add it to the snippets section where it can be stored and used in other letters as a template.

Practice Manager Tab



This section allows you to pull information from various areas of HPM including:

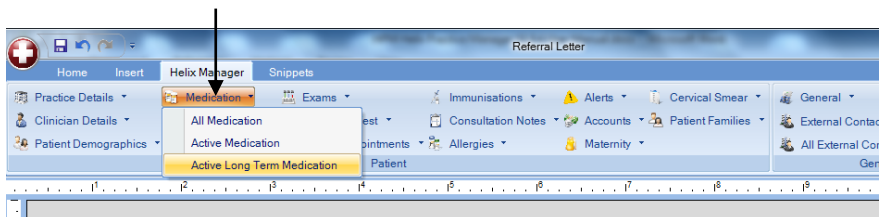
- Practice Details
- Clinical Details

- Patient Demographics
- Medication
- Medical Conditions
- Exams
- Immunisation
- Consultation notes
- Allergies
- Alerts
- External contacts
- Accounts
- Maternity
- Smear
- Appointments

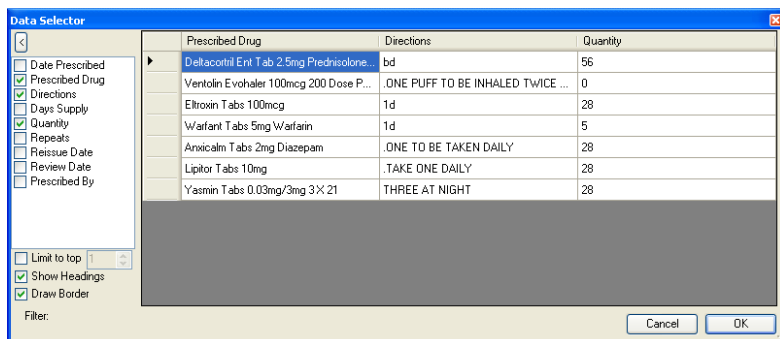
This is used to quickly and easily import patient or practice details into your letter.

For example, if you wanted to include the patient's Medication in the letter, simply click on Medication. There will be a drop down list with three options:

- All Medication – opens a table with all medications
- Active Medication – Only medications that are currently active
- Active Long Term Medication – Active Medications that are long term only.



When you select All Medications, a table will open with all medications.



If you want all medications with all details (date prescribed, drug name, directions, quantity, etc.) click OK and the entire table will appear in the letter.

Date Prescribed	Prescribed Drug	Quantity	Reissue Date	Review Date	Prescribed By
03/07/2008	Tylex Caps Caps 30mg/500mg (Codeine/paracetamol)	1	04/07/2008	22/07/2008	Dr. Nial O'Leary
14/05/2008	Nu-seals Aspirin 300mg Tabs 300mg (Aspirin)	30	13/06/2008	28/04/2015	Mary Brocklebank
15/04/2008	Nu-seals Aspirin 300mg Tabs 300mg (Aspirin)	30	15/05/2008	13/06/2008	Dr. Intan Shamsudin

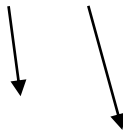
Filters

If you want to filter this information, i.e., you don't want the entire table to appear in the letter, you can remove columns, or set filters for certain columns

To exclude a particular column, un-tick it from the list on the right hand side.

To set a filter, right click on the column name and select Quick Filter. Depending on the column you select there will be different options in here.

For example, to set a filter to include only the last 3 months of medications, right click on Date Prescribed, go to Quick Filters and select In Last 3 months.



The screenshot shows the 'Data Selector' window. On the left is a list of filters: Date Prescribed, Prescribed Drug, Directions, Days Supply, Quantity, Repeats, Reissue Date, Review Date, and Prescribed By. Below this list are checkboxes for 'Limit to top' (set to 1), 'Show Headings', and 'Draw Border'. A 'Filter:' label is at the bottom left. The main area is a table with columns: Date Prescribed, Prescribed Drug, and Directions. A 'Quick Filter' dropdown menu is open over the 'Date Prescribed' column, showing options: 'Today', 'In Last 12 Months', 'In Last 6 Months' (highlighted), and 'In Last 3 Months'. The table contains several rows of prescription data.

Date Prescribed	Prescribed Drug	Directions
15/04/2009	Salacortil Epi Tab 2.5mg B...	bd
17/07/2009		...ONE PUFF TO BE INHALE...
17/07/2009		1d
17/07/2009		1d
03/02/2009	Anxicalm Tabs 2mg Diazepam	...ONE TO BE TAKEN DAILY
03/02/2009	Lipitor Tabs 10mg	TAKE ONE DAILY
03/02/2009	Yasmin Tabs 0.03mg/3mg 3 ...	THREE AT NIGHT



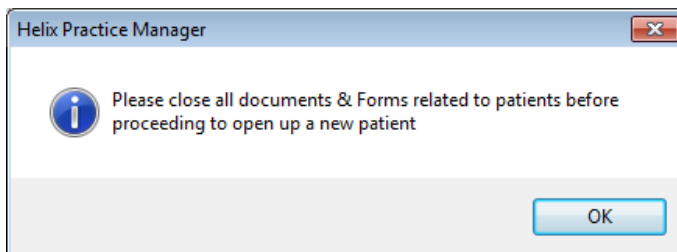
To print the Letter click the print icon at the top left of the screen.



To save the Letter, click the save icon in the top left hand side of the screen and click the x button to close.

You can use the minimise button on the top right of the screen to temporarily close the letter and go back to the patient screen. It will go to the bottom of your screen, simply click on the letter to open it again.

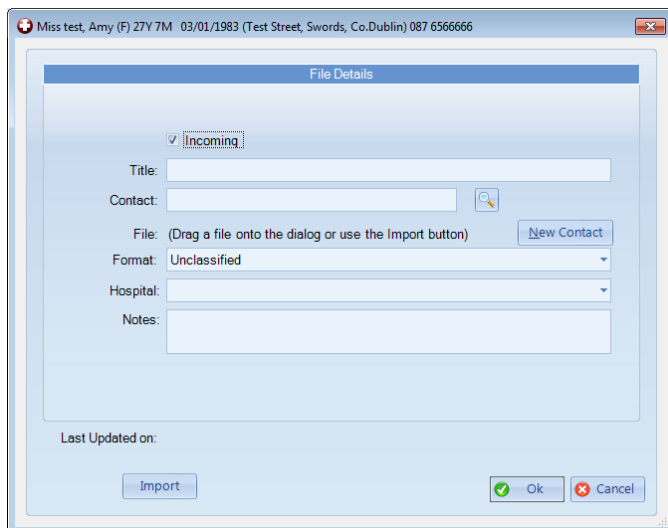
You must close any letters or forms open for a patient before opening another patient file. If any documents are still open the following message will appear:



Importing Letters

The second way of saving letters in this section is to use the Import button.

When you click this you will see the screen below.



Fill in the Title of the document or image you are importing. Then use the Import button at the bottom to find the file you are importing.

For example you could have a letter from an email which you saved in My Documents; you can browse to this document and import it into patient letters.

STC Forms

By selecting STC form the below screen will appear and the user can fill it in and print. The saved STC form will for saved to the patient file in the Forms tab.

STC

STC Code: Claim Date: 18/11/2010 Location: Agency for EU Patients: Visit Class: Distance Code: Time: 14:47 Special Service Code:

For Special Service Codes R, T, S or U

Name of Vaccine: Batch Number: Injection Site: Expiry Date: Shot (Hep. B Only):

For Special Service Codes R, T or S

CHD CLD DIAB. M Renal Disease Immuno

For Special Service Code U

Occup. Risk Travel Hep. B Contact:

Doctor: Referring Doctor:

Print Cancel

Patient Labels

You can print an A4 page of patient labels and these can be configured in templates to what individual users want to print out.

Patient Quick Letter

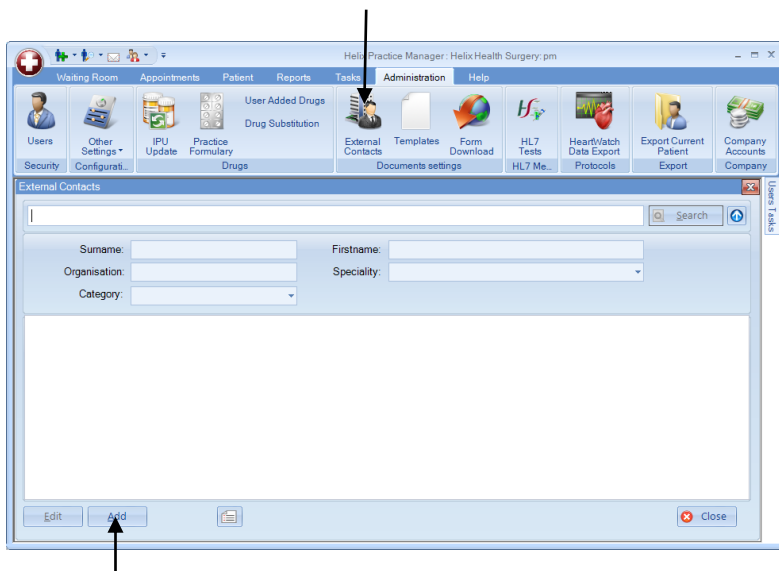
This can be configured in templates to what individual users want to print out.

External contacts



Certain letters will be addressed to external contacts which need to be added into the system through the Administration section.

To add a new contact, click on the Administration tab, and select External contacts. To add a new one click the Add button.



You can then add in all the contacts details in the screen shown below. Required fields will be highlighted in red. Once all the details are filled in, click OK to save.

External Contact Details

Category: Speciality:

Title: Department:

Surname: Email Address:

First Name: Phone Number:

Qualifications: Mobile Phone Number:

Organisation: National Agency Identifier:

Opening Hours: Fax Number:

Address Line 1: Other Identifier:

Address Line 2: Bill To Company:

Location: Notes:

Address Line 4:

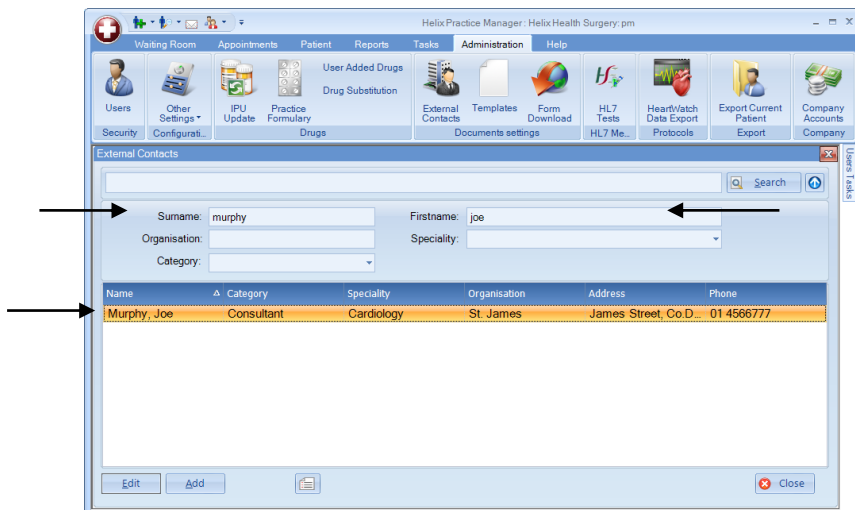
☐ Public ☐ Is Inactive


☐ Private

You can now use this contact in any of your letters.

To edit these details open the contacts section and search for the contact by filling in their surname, category, organisation or speciality, then click the Search button.

Select the one you want to edit and click the edit button.



You can print a label for this contact by selecting the contact and clicking the label button 

Letter Templates



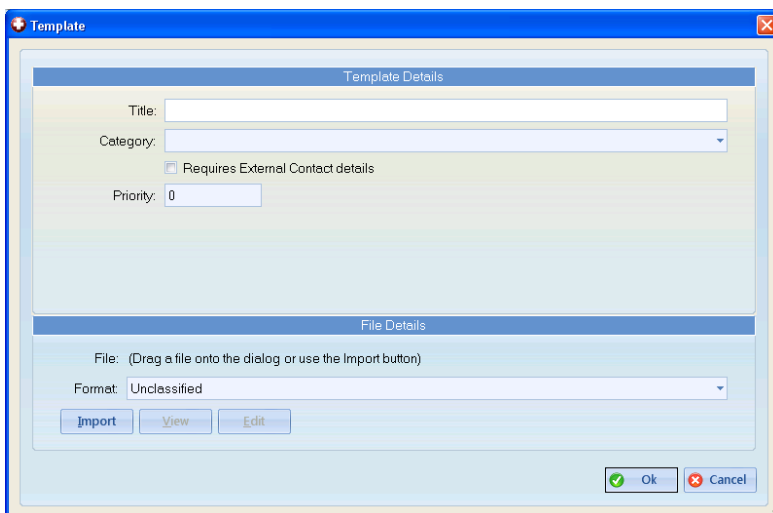
There is a standard list of letters that are in the letters section. However, if there is a letter that you need to use often that is not in that list, you can create your own template and add it to this list.

To create a new template letter, go to the administration section and select the Templates option.





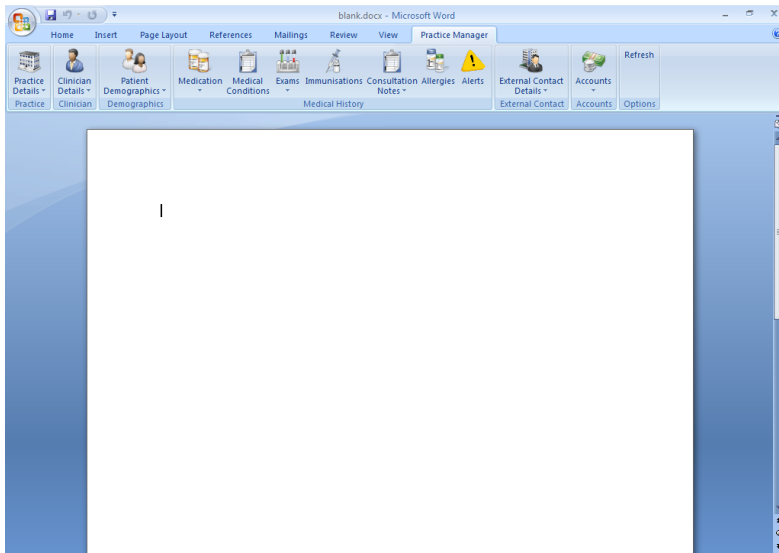
To add in a new letter click Add.



- Title - This is the name that will appear in the letter drop down list
- Category - You can also categorise your letters.
- Requires external contact – if this option is ticked, you will be asked to provide an external contact when using this letter in future.

When you have the above information filled in, click the Import button. You will need to select an RTF document from your documents folder. Select this file and click Open. Alternatively you can create a new blank document by clicking the New Doc button. Then click edit to open the blank document ready to be filled in with whatever details you want in your letter.

Hint: An easy way to create new templates is to open a similar template from HPM and save a copy of it to your Desktop. You can then import this letter instead of a new blank one, and use it as your new template by editing it as needed.



You can import demographics about the patient or surgery from here using the Practice Manager tab.

When you close the template letter, you will be prompted to save your changes, select yes, and then click OK.

Your template is now ready to be used for your patient letters.

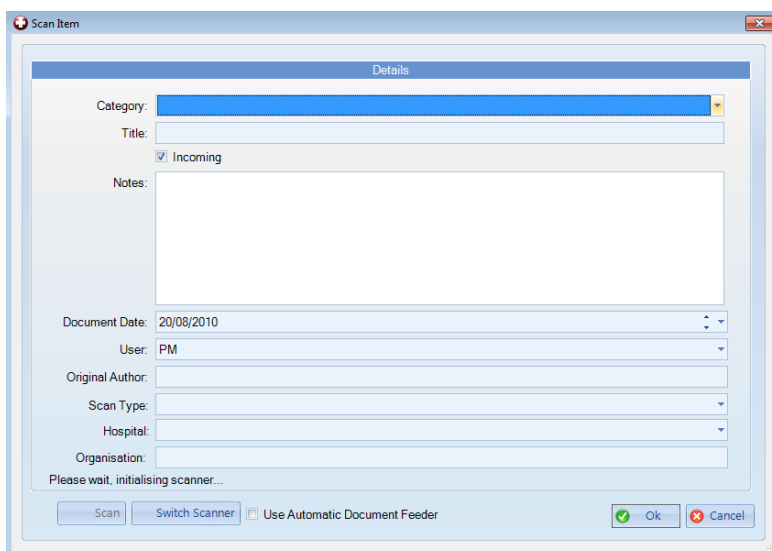
Documents

The documents section can be accessed by clicking the Documents Tab on the left of the screen. This is where all

the patient's scans are held. You can also import documents or images here as in the letters section.

Scanning

To add a new scan, click the Scan button. The document in the scanner will immediately be scanned in and the following screen will appear.



The screenshot shows a 'Scan Item' dialog box with a 'Details' tab. The fields are as follows:

- Category: A dropdown menu.
- Title: A text input field.
- Incoming: A checked checkbox.
- Notes: A large text area.
- Document Date: 20/08/2010.
- User: PM.
- Original Author: A text input field.
- Scan Type: A dropdown menu.
- Hospital: A dropdown menu.
- Organisation: A text input field.

At the bottom, there is a status bar that says 'Please wait, initialising scanner...' and buttons for 'Scan', 'Switch Scanner', 'Use Automatic Document Feeder', 'Ok', and 'Cancel'.

A preview of the image will appear on the right. On the left are a number of details to describe the item you are scanning:

- Category – scans can be categorised into various areas so that they can be found and viewed more easily.
- Title – All scans should be given a title

- Incoming – This tick box will mark whether the scan is incoming to the surgery or something that was sent out to the patient.
- Notes – you can write any extra details about the scanned item here.
- Document Date – This will default to today's date but can be changed to the date the document was actually received.
- User – The person who was logged on when the image was scanned.
- Original author – The person who created the document, e.g. consultant doctor.
- Organisation – Where the scan originated e.g. hospital.

If there is a problem with the scanner of the image was not scanned right you can re-scan it by selecting the scan button.

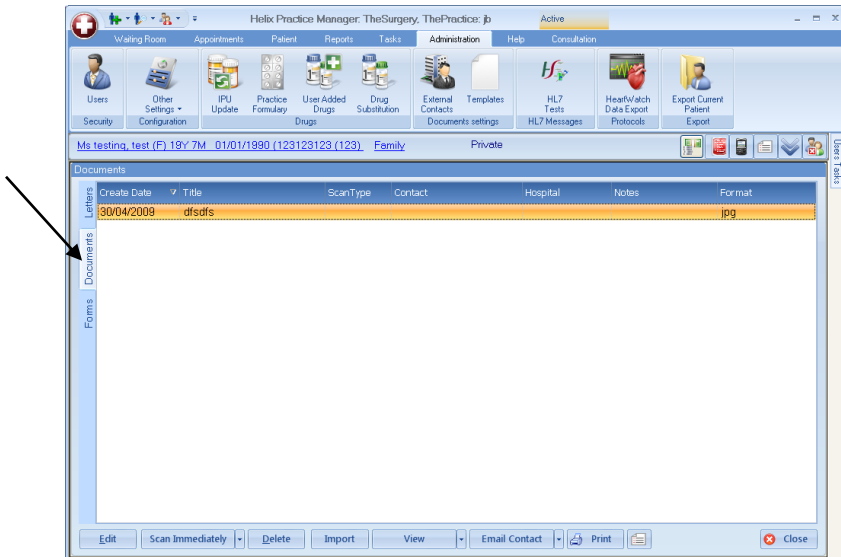
Once you have entered the details of the scan, click OK to save it.

There is a shortcut to do a new scan from the patient's file, click on the documents Drop down option in the main ribbon and select Scan Document.

There is another area to do multiple patient scanning. This is detailed in the Tasks section of this manual under the heading High Volume Scanning.

Viewing a scan

To view a scan, enter the documents section by clicking on the tab on the left of the screen. Here you will see a list of scans for the patient, to open one simply double click on it and it will open in PDF form.



You can print multiple scans by highlighting the required scans (Hold down Ctrl + left click) and clicking print

Forms

The final tab in the documents section contains any forms. There are various standard forms included on the system.

The screenshot displays the Helix Practice Manager software interface. The title bar reads "Helix Practice Manager: Helix Health Surgery. xl". The menu bar includes: Waiting Room, Appointments, Patient, Reports, Tools, Decision Support, Administration, and Help. The toolbar contains icons for Search, Add, New, History, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Records, Documents, Sketch, and Accounts. The patient information bar shows: "Jones, John (Male) 0804/1978 82V 5M (111111111111) (15 Church Street, Tallaght, Dublin 24)". It also includes tabs for Family and Private, and a status bar indicating "Alerts: This patient has alerts", "Drug Allergies: Penicillin Susp 250mg/5ml (Critical)", and "Other Allergies: House Dust (Minor)". The main window is titled "Documents" and contains a table with the following data:

Title	Category	Contact	Create Date
Medical Card form	PatientForms\General		22/09/2008
form	PatientForms\General		22/09/2008

At the bottom of the window, there are buttons for "Edit", "Add", and "Close".

To enter a new form for that patient, click on the Add button.

Miss test, Amy (F) 27Y 7M 03/01/1983 (Test Street, Swords, Co.Dublin) 087 6566666

File Details

Form: Biochemistry

Title: Biochemistry

Last Updated on:

Ok Cancel

- The Form field will contain a drop down list of all forms.
- The Title allows you to save a description of the form you are writing.

Once you have this information entered, click OK to open the form.

Form Viewer

MRN 121424324 PPI APX n/a Word / Loc

Surname t e s t Consultant / GP Dr David Reidy

Forename A m y Send Report To 52 Broomhill Road, Tallaght, Dublin 24, Ireland

Patient Address Test Street, Swords, Co.Dublin DATE OF BIRTH 0 3 0 1 8 3 SEX M F

Sample Type: Blood / Urine

OUT PATIENT DAY PATIENT IN PATIENT

DOCTOR'S SIGNATURE

SPECIMEN DATE 1 8 0 8 1 0 TIME 16:00

HOSP. EMERGENCY	PROFILES	ENDOCRINE	IMMUNOLOGY
U/E <input type="checkbox"/>	PATIENT PROFILE <input type="checkbox"/>	THYROID (Separate Sample)	TESTS REQUIRED: (Separate Sample)
GLUCOSE <input type="checkbox"/>			
OTHER TEST REQUIRED:	OTHER TEST REQUIRED: (Separate Sample)	OTHER TEST REQUIRED: (Separate Sample)	
TEL EXT: 2528	TEL EXT: 2528	TEL EXT: 2536	TEL EXT: 2535

BIOCHEMISTRY DEPARTMENT **Submit** CORK UNIVERSITY HOSPITAL TEL. 021 546400 IF-C-BIO-REQ

Click the submit button on form to save or print the form. Automatically Print Form on Submit

Delete Close

The form will open with the patients main details, such as name, address etc., entered on the form automatically. You can then fill in the rest of the details as needed by typing directly onto the form.

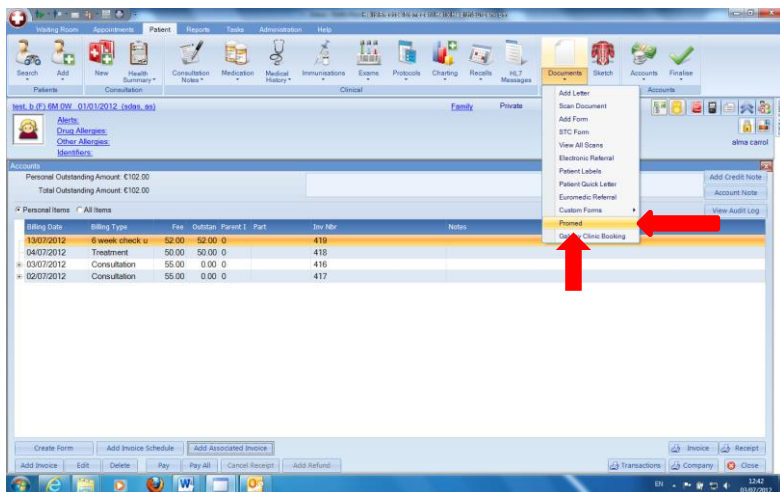
Submit At the bottom of all forms there is a submit button, click this to save and print the form with the information you have filled in.

Editing forms

To edit or reprint a form, open the forms section, here you will see a list of previously saved forms. Select the form you want to edit/reprint and open it by double clicking on it.

Promed

There is now an option in HPM for **“Promed”** who provide external medical devices to surgeries. This can be accessed from the documents tab> Promed.



Within this option – you can now take blood pressure readings & other tests & the details will be stored in the documents section in HPM with the title of the document been the name of the test.

iPCRN Export

Users can now export diabetic patient's details to iPCRN and then receive a detailed statistical report on the diabetic patients for their practice and how it compares to the country as a whole. The research file will automatically

be exported to the IPCRN from our system (this could take a few minutes depending on the size of the system). Users can do the export in admin -> IPCRN export.

For more information, please see

<http://ipcrn.ie/index.html>. The export is only relevant for Icd10 codes of E10%, E11%, O24, O24.4 and O24.9. For Icdpc2 codes, it works for T89, T90 and W85.

Emails

There are a number of areas which can be used to send emails, either to patients, or to other contacts. Emails can be sent from Appointments, Patients Charts, Recalls and Exam Management. See the Administration chapter of the manual for full details on setting up email accounts.

Letters created in the documents section can be emailed,

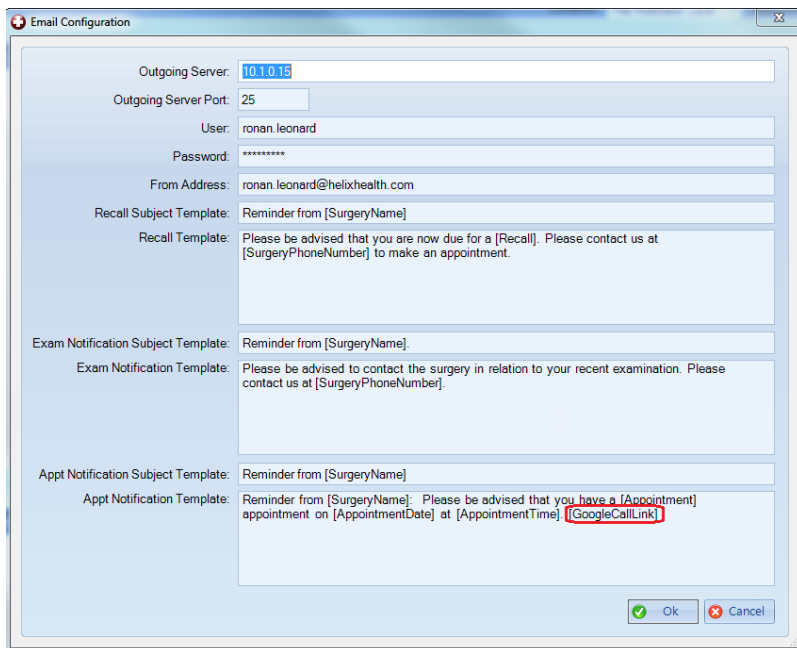
Appointment Emailing

The functionality to send an email when an appointment is booked has been added. This can be configured in practice configuration by ticking "send email after appointment". This will send an email direct to the patient if they have consented to email and have a valid email address.

The screenshot shows the 'Practice Configuration' window with the 'Practice Details' tab selected. The window contains various fields for practice information. The 'Practice Name' is 'The Wellness Centre'. Other fields include 'National Agency Identifier', 'Care Team', 'Care Team Code', 'Heartwatch Number', 'Condition Encoding' (set to 'Default'), 'Audit Changes' (checked), 'Lock Health Items After' (24 hours), 'TeleHealth Pod User', 'Default Exam', 'Consider late after' (0 mins), 'Use Clinical Coding' (checked), 'Send SMS after new appt.' (unchecked), 'Send Email after new appt.' (checked and highlighted with a red box), 'HealthLink Referral enabled' (unchecked), 'Ad-Hoc reports address', 'Custom Ad-Hoc address', 'Print Controlled Drugs' (checked), 'Locations for invoices' (unchecked), and 'Practice Id' (088E5188-1CC4-40D6-A0B4-E7211E3FF11F). A 'Script Details' button is located below the 'Practice Id' field. At the bottom right are 'Ok' and 'Cancel' buttons.

Field	Value
Practice Name	The Wellness Centre
National Agency Identifier	
Care Team	
Care Team Code	
Heartwatch Number	
Condition Encoding	Default
Audit Changes	<input checked="" type="checkbox"/>
Lock Health Items After	24 Hours
TeleHealth Pod User	
Default Exam	
Consider late after	0 Mins
Use Clinical Coding	<input checked="" type="checkbox"/>
Send SMS after new appt.	<input type="checkbox"/>
Send Email after new appt.	<input checked="" type="checkbox"/>
HealthLink Referral enabled	<input type="checkbox"/>
Ad-Hoc reports address	
Custom Ad-Hoc address	
Print Controlled Drugs	<input checked="" type="checkbox"/>
Locations for invoices	<input type="checkbox"/>
Practice Id	088E5188-1CC4-40D6-A0B4-E7211E3FF11F

There is also an option to send a link to the patients Google Calendar with this email for patients that have a Gmail account. This can be done by editing the email text in email configuration, adding the highlighted text below at the end of the email.

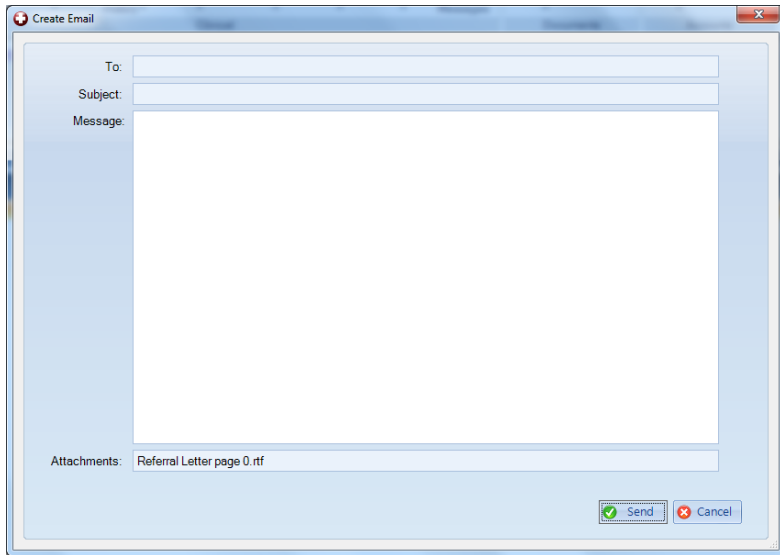


The image shows a screenshot of an "Email Configuration" dialog box. It contains several fields for configuring email settings. The "Outgoing Server" field is set to "10.10.15". The "Outgoing Server Port" is set to "25". The "User" field is set to "ronan.leonard". The "Password" field is masked with "*****". The "From Address" field is set to "ronan.leonard@helixhealth.com". The "Recall Subject Template" field is set to "Reminder from [SurgeryName]". The "Recall Template" field contains the text "Please be advised that you are now due for a [Recall]. Please contact us at [SurgeryPhoneNumber] to make an appointment." The "Exam Notification Subject Template" field is set to "Reminder from [SurgeryName]". The "Exam Notification Template" field contains the text "Please be advised to contact the surgery in relation to your recent examination. Please contact us at [SurgeryPhoneNumber]". The "Appt Notification Subject Template" field is set to "Reminder from [SurgeryName]". The "Appt Notification Template" field contains the text "Reminder from [SurgeryName]: Please be advised that you have a [Appointment] appointment on [AppointmentDate] at [AppointmentTime] ([GoogleCallLink])". The "GoogleCallLink" is highlighted with a red box. At the bottom right, there are "Ok" and "Cancel" buttons.

Outgoing Server:	10.10.15
Outgoing Server Port:	25
User:	ronan.leonard
Password:	*****
From Address:	ronan.leonard@helixhealth.com
Recall Subject Template:	Reminder from [SurgeryName]
Recall Template:	Please be advised that you are now due for a [Recall]. Please contact us at [SurgeryPhoneNumber] to make an appointment.
Exam Notification Subject Template:	Reminder from [SurgeryName]
Exam Notification Template:	Please be advised to contact the surgery in relation to your recent examination. Please contact us at [SurgeryPhoneNumber]
Appt Notification Subject Template:	Reminder from [SurgeryName]
Appt Notification Template:	Reminder from [SurgeryName]: Please be advised that you have a [Appointment] appointment on [AppointmentDate] at [AppointmentTime] ([GoogleCallLink])

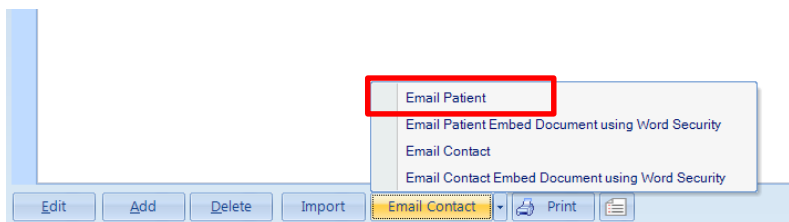
Document Emailing

Once documents are saved, they can be emailed. Go to the documents section, click on the letter you wish to email and click on the Email Contact option. The following screen will open:



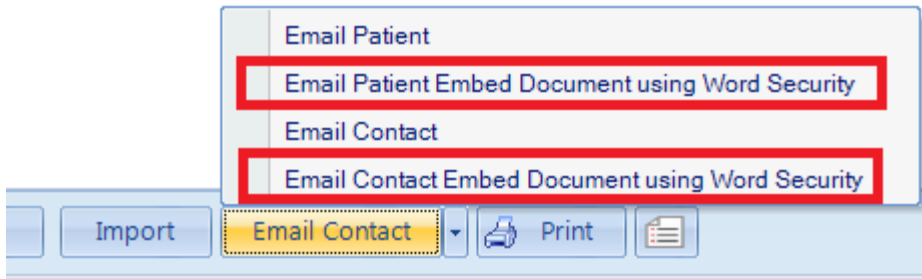
Enter the email address of the contact you wish to email. The subject and message can be typed as required. The document selected will be included as an attachment.

You can also email letters to the patient, click on the drop down option beside Email Contact and select email patient:

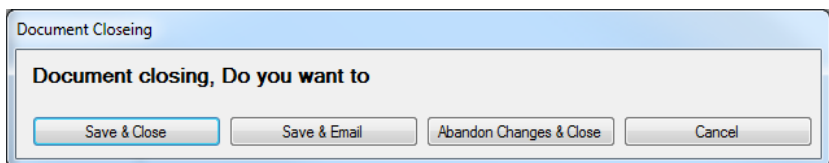


The patient must have an email address entered in their Demographics for this option to work.

In patient's documents, you can email letters and scans to external contacts or patients. When users select a letter or scan to email they will be prompted to enter a password for the document and this password will need to be entered by the recipient to open the document.

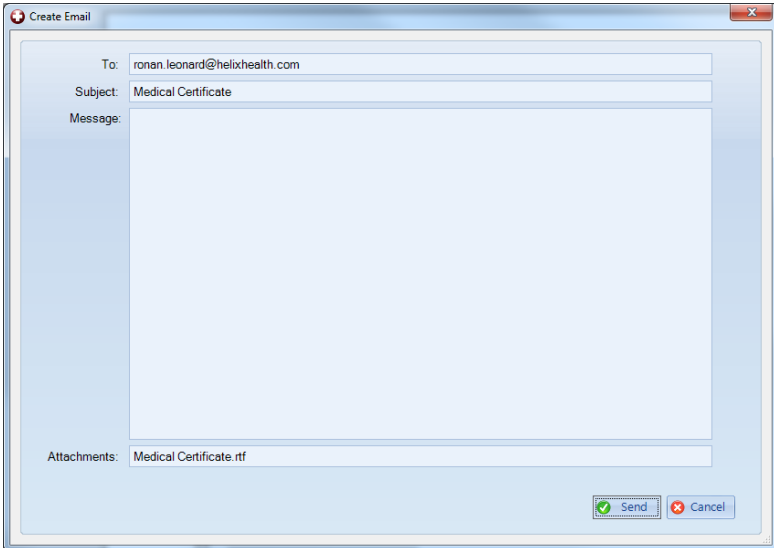


Another way to email documents from patient's charts has been added. When you close a document without saving first, instead of the normal popup to save the document, you will see the following pop-up:



Here you have options to save and email, save and close, abandon the letter and cancel to go back to editing.

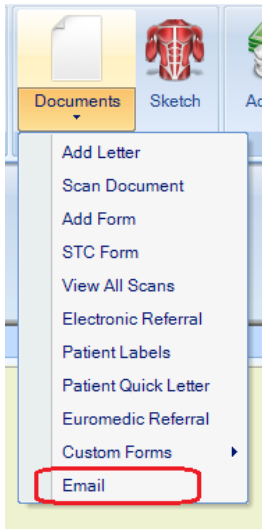
When you click on Save & Email, you will get the below screenshot, just proceed to send the email as normal.



If you save using the disk in the top left of the screen, the system will presume that you just want to save the document and no email prompt will appear. This is as it was in previous versions. If you are using Outlook for email, it will open the outlook window with the document attached.

Patient Emails

There is now also an area where you can track the emails that have been sent to a particular patient. To do this, click on the documents drop down in the patients chart and select email, see screenshot below;



When you click on this, you will be able to see a list of emails that were sent relating to the patient, see screenshot below

The screenshot displays the HPM User Manual interface, specifically the Patient module. The top navigation bar includes tabs for Waiting Room, Appointments, Patient, Reports, Tasks, Administration, and Help. Below this, a series of icons represent various clinical functions: Search, Add, New, Health Summary, Consultation Notes, Medication, Medical History, Immunisations, Exams, Protocols, Recalls, HL7 Messages, Documents, Sketch, Accounts, and Finalise. The main content area shows a patient profile for 'Ms Test, Anne-Marie (F) 37Y 1M 21/10/1976 (address 1, Cork)'. Below the profile, there is a section for 'Patient Emails' with a table listing email entries. The table has columns for To, Subject, Date Sent, and From. The first entry is highlighted in orange. To the right of the table, there is a form for composing an email, with fields for From, To, BCC, Subject, and Message.

To	Subject	Date Sent	From
ronan.leo	save and email	21/11/2013	PM
ronan.leo	emailing letter	21/11/2013	PM
ronan.leo	Standard Patie...	21/11/2013	PM
ronan.leo	Standard Patie...	15/11/2013	PM
ronan.leo	Standard Patie...	15/11/2013	PM
ronan.leo	Standard Patie...	15/11/2013	PM

From: PM
To: ronan.leonard@helixhealth.com
BCC:
Subject: save and email 2
Message:

Online Cancer referrals

Setting up Online Referrals

Online referrals are sent through Healthlink. In order to do this, each Machine must be set up with an individual Certificate which must be applied for through Healthlink. For more information on setting up Certificates, you can go to www.healthlink.ie.

Once you have received your Certificates from Healthlink, you can contact Helix Health Customer Support (01 4633098) to complete the setup process.

Sending Online Referrals

There are currently three types of cancer referrals that can be sent online through Healthlink from HPM:

1. Breast Cancer
2. Prostate Cancer
3. Lung Cancer

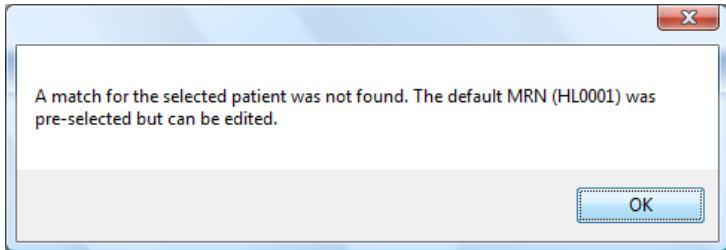
For each of the above referral types, there is a form available which can be filled in and sent directly to the Hospital via Healthlink.

To complete and send an online referral, complete the following steps:

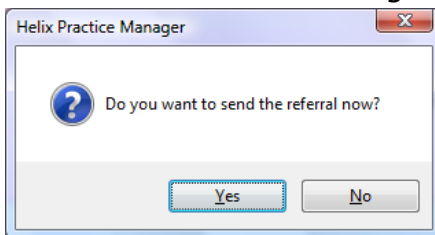
1. Open the relevant patient's chart
2. Press Documents drop down button in the ribbon.
3. Select cancer referral

The screenshot shows the HPM software interface. The top ribbon has tabs for 'Waiting Room', 'Appointments', 'Patient', 'Reports', 'Tasks', 'Administration', and 'Help'. The 'Patient' tab is active, showing a patient's chart. The 'Documents' dropdown menu is open, and 'Cancer Referral' is highlighted. The patient's name is 'test_dave (M) 59Y 8M' and the date is '02/06/1951 (sda_sda)'. The 'Documents' section lists various documents, including 'Referral Letter Joe Murphy' and 'Patient Consultation Notes'. The 'Long Term Medication' section lists medications like 'Warfarin' and 'Zantac'. The 'Medical History' section shows a diagnosis of 'SCHEMIC HEART DISEASE WITH ANGINA'. The 'Tests' section shows a 'Systolic' blood pressure reading of 12.00. The 'Recall Opportunities' section shows a 'Flu Vaccine (Not Notified Yet)'.

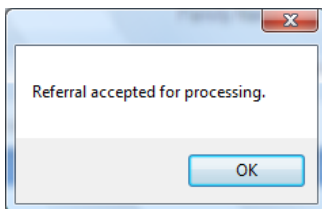
4. Select a referral type from the drop down Menu at the bottom of the screen e.g. Breast Cancer , Prostate Cancer, or Lung Cancer
5. Press Add to open the referral form.
6. Before the form opens, the system will check Healthlink for a match of the patient, i.e. if there is any previous record of that patient. If a match patient is found their details will be displayed on the form with their previous MRN number.
If not a default MRN will be picked for them which can be changed later.



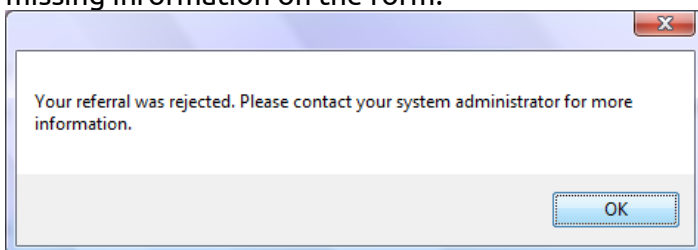
7. Enter all the required details on the referral form. Each form has a number of required fields indicated by *, such as Hospital, Priority, reason for referral, etc. Also there are a number of automatically filled fields, such as Name, Date of Birth, Medical History, etc. Complete the form as required and click OK.
8. You will be asked if you want to send the referral now. Press yes if you have entered all the correct details and are ready to send the referral now. If you select no the form will be saved and can be edited and sent at a later stage.



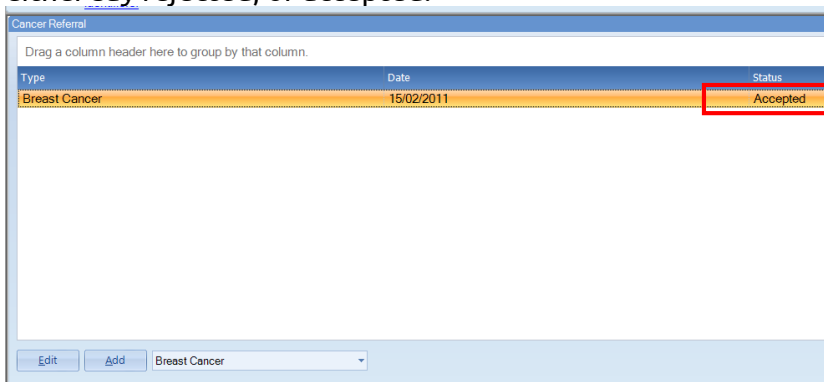
9. You will get an acknowledgement message for your referral to confirm the form is being processed.



Alternatively, a message will appear if your form is rejected or failed to send. This may be due to missing information on the form.



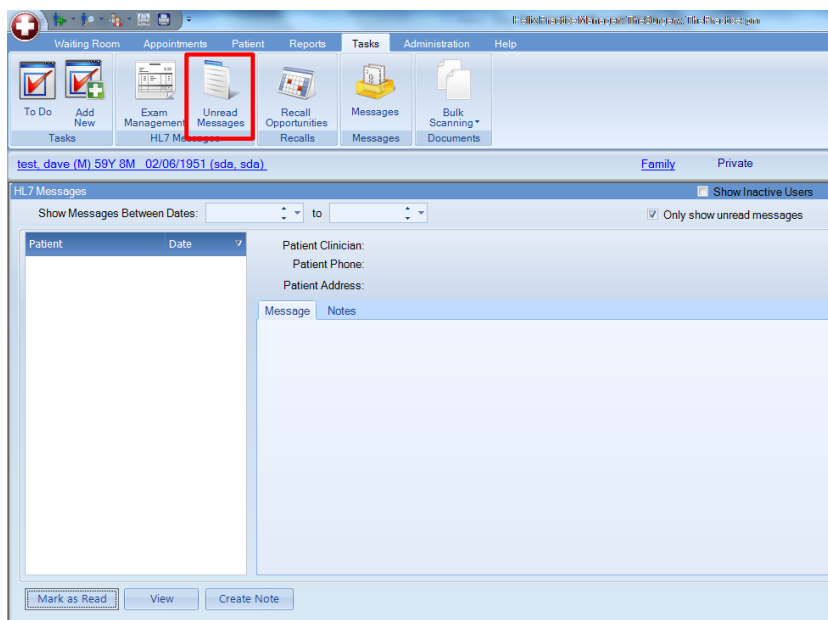
The referral form will be saved in the Cancer Referral section with the name of the referral, the date it was entered, and the Status of the referral. The status will either say rejected, or accepted.



From here you can also edit the referrals or add new referrals.

HL7 Referral Messages

When the referral has been addressed in Healthlink, a HL7 Message will be sent by Healthlink to HPM and will appear in the HL7 messages section. To read these messages go to Tasks and Unread Messages. You can review all Healthlink messages from here. The message will also appear in the patients file in the HL7 Messages section in the top ribbon.



Euro Medic Referrals

There is now an option to do an electronic referral on line to each of the Euro Medic locations in Ireland. This feature can be accessed from the Documents>Euro Medic Referrals as shown below.

The screenshot shows a window titled "Euro Medic Booking" with a close button in the top right corner. The window contains a form with the following fields and sections:

- Please fill in the details for the scan to be booked**
- Scan type:** A dropdown menu with "MRI" selected.
- Location:** A dropdown menu with "Charlemont" selected.
- Date:** A date picker showing "25/06/2012".
- Appointment Slots:** A table with columns "Day" and "Date".

Day	Date
Monday	11:10 25/06/2012
Monday	11:45 25/06/2012
Monday	14:00 25/06/2012
Monday	14:35 25/06/2012
Monday	15:10 25/06/2012
Monday	15:45 25/06/2012
- Questions:** A list of checkboxes with the following text:
 - ☐ Do you have an artificial heart valve?
 - ☐ Have you ever had metal fragments in your eyes or skin from working with metal (i.e. welding or cutting)?
 - ☐ Do you have stents / shunt fitted?
 - ☐ Do you have any problem with mobility?
 - ☐ Have you ever had a disectomy / surgery to the spine (this applies to an MRI of the lower spine only)?
- Scan Reason:** A text box containing "RTA last week. Has pain in left shoulder for 3/7".
- Previous scan history:** A text box containing "sdfd".
- Booking Reference:** An empty text box.
- Booking As:** A dropdown menu with "Dr John Gill" selected.
- Buttons:** "Book" and "Close" buttons.
- Footer:** "MRI in Charlemont on Monday the 25/06/2012 at 14:35"

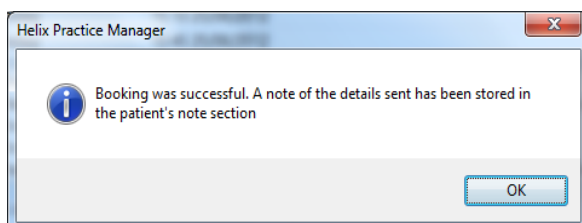
When you select a scan type, it will populate the Euro Medic locations in the drop down list which perform those scans.

You can then select a date for which it will display the free appointments slots for that date and the next 6 days.

After you select a time slot, the 'book' button becomes enabled and when clicked the details of the booking is saved in the consultation notes of the patient.

The 'scan reason' section in the Euro Medic referral will pull in today's consultation note if one present.

Once you have clicked the Book button the screen above will appear.

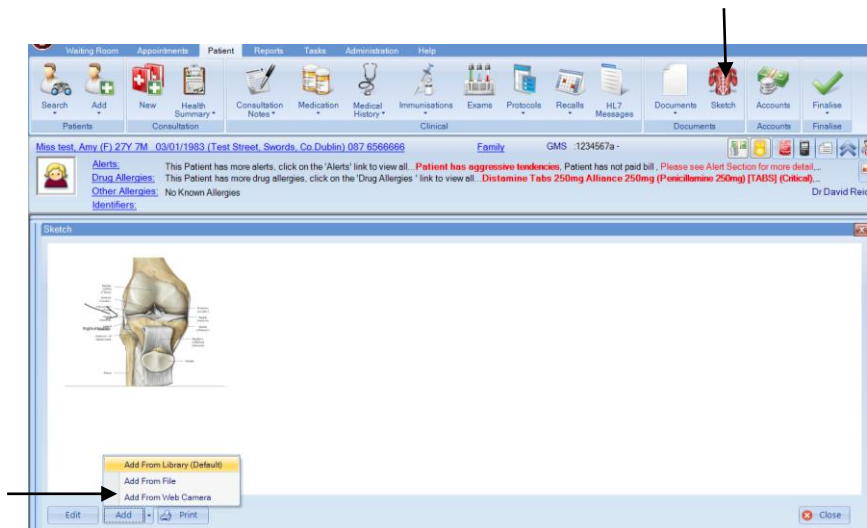


Sketch

The sketch section gives you a more visual interpretation of your patient and the problems they may be having. This section allows you to add pictures to a patients chart which can be edited by drawing on or adding text to them. You can also import your own images such as from cameras or emails which can be edited in the same way.

Adding a Sketch

To add a new Sketch to a patient's records, first open the patient's summary screen, and select the Sketch option in the ribbon at the top of the screen



You can either choose an image to use from the library of images provided in this software, or you can browse to an

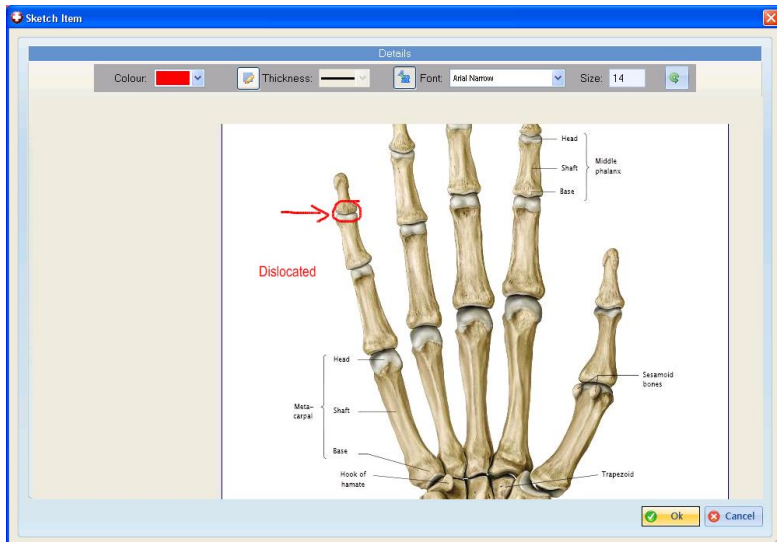
image you have already saved from an email or copied from a camera.




If you have a Web Camera attached to your computer, you can take images directly using this.

You can do this by clicking the drop down arrow beside the Add button.

If you choose to add from library, you will get a list of images which are clearly labelled. Choose one and click OK.

You will then see a larger version of the image with a selection of tools at the top.



- Colour – This option determines the colour of the text
-  - The pencil icon; selecting this allows you to draw freely on the image by clicking and holding down on the left mouse button.
- Thickness – This option controls the thickness of the pen while drawing.
-  - This icon switches to text mode, to enter text on the image simply click once on the image where you want to start writing, and then start typing.
- Font – You can choose from a range of different font styles.
- Size – This option allows you to change the font size of text.
-  - The undo button will undo the last typing or drawing you have done
- Title – At the bottom of your image there is a field for inputting a title for your sketch.

To save you image, click OK.

You can print these images by clicking the Print button, or edit them by selecting the image and clicking Edit.

Accounts

Within HPM you have a full accounting module for private patients and charges that are outside the GMS.

Before charging a patient individually you must set up your products price list and payment type in the administration section.

Account Administration

To set up a price list for your practice

- Click on Administration on the top of the screen

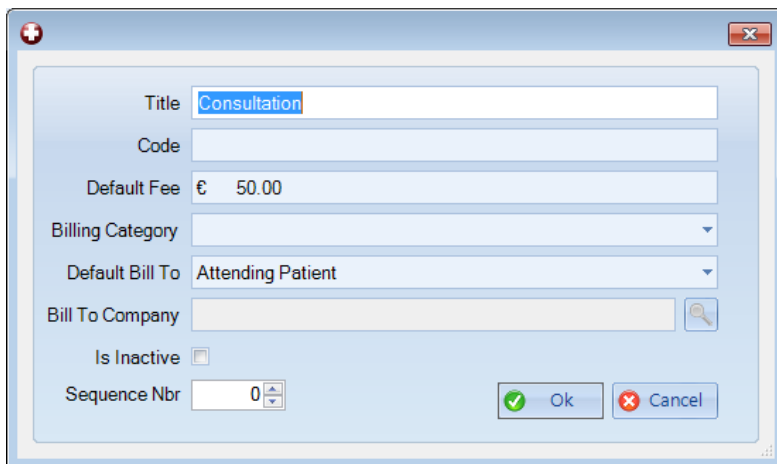


- Click on Other Settings icon on the top ribbon
- From the list select Lists and Drop Downs
- Click on the + sign beside Accounts

This will display two options Billing Type and Payment Type

Billing Type

- Click on Billing Type – from this screen you can add, edit, activate or deactivate a payment type.
- To add a type click on ADD. In the title field add in the text for the invoice or receipt.

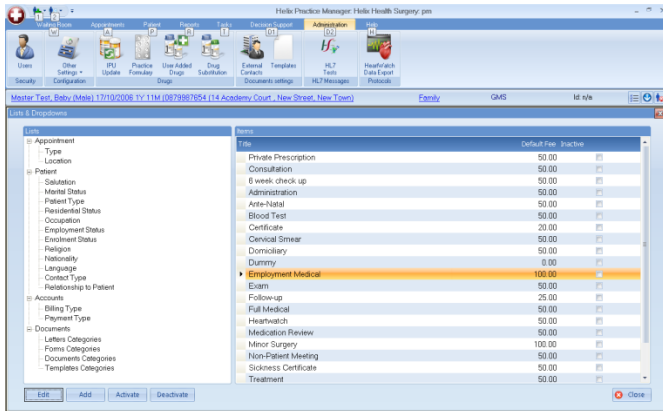


The screenshot shows a 'Fee Entry' dialog box with the following fields and controls:

- Title:** A text field containing 'Consultation'.
- Code:** An empty text field.
- Default Fee:** A text field showing '€ 50.00'.
- Billing Category:** A dropdown menu.
- Default Bill To:** A dropdown menu showing 'Attending Patient'.
- Bill To Company:** A text field with a search icon (magnifying glass) to its right.
- Is Inactive:** A checkbox, currently unchecked.
- Sequence Nbr:** A numeric field with a spinner, showing '0'.
- Buttons:** 'Ok' (with a green checkmark icon) and 'Cancel' (with a red X icon) buttons at the bottom right.

- Title – This is the name of the Fee it will appear on receipts and Invoices
- Code – Fees can be coded if required, for example VHI price codes.
- Default Fee is the amount that will be entered on the invoice or receipt. This can be manually changed at time of consultation if required
- Billing Category – Invoices can be categorised, there is a separate list in the lists and drop down section for this.
- Default Bill to – This can be set to default this type of bill to either the attending patient, company, consultant, solicitor, etc
- Bill to company – If in the above field you choose to default the bill to a company, you can specify the company here.
- In Inactive – If this bill type is no longer needed, deactivate it here.
- Sequence Number – You can choose the bill type priority in the list here

Click on OK to save. To edit an existing record click on edit – from here you can change the text, price, etc, of the item



Payment Type

Payment type allows you to enter whether an invoice is paid by cash, credit card, laser card or cheque.

By using this you can then run a report on takings by these methods.

Adding Patient Accounts

Patient Accounts can be accessed from the Waiting Room or from the Patient Summary Screen.

HelixPractice Manager - Helix Health Surgery: pm

Waiting Room Appointments Patient Reports Tasks Administration Help

Search Add New Health Summary Consultation Notes Medication Exams HL7 Messages Documents Sketch Accounts Finalise

Patients Consultation Clinical Documents Accounts Finalise

Miss test, Amy (F) 27Y 7M 03/01/1983 (Test Street, Swords, Co.Dublin) 087 Family GMS :1234567a -

Alerts: This Patient has more alerts, click on the 'Alerts' link to view all. **Patient has aggressive tendencies.** Patient has not paid bill. Please see...
Drug Allergies: This Patient has more drug allergies, click on the 'Drug Allergies' link to view all. **Distamine Tabs 250mg Alliance 250mg (Penicillamine**...
Other Allergies: No Known Allergies
Identifiers: Dr David Reidy

Health Summary Consultation History Patient History

Documents Add New
 Biochemistry 18/08/2010
 Referral Letter Joe Murphy 11/08/2010
 Medical Certificate 17/06/2010
 Referral Letter Paul Jones 17/06/2010
 Long Term Medications on 17/06/2010
 Referral Letter Joe Murphy 17/06/2010

Long Term Medication Add New
 12/11/2010 Dileve Dr Caps 75mg Diclofenac on...
 10/09/2010 Aspirin 75mg Lactose Free Caps Ulti...
 10/09/2010 Glucophage Tabs 500mg one To Be T...
 10/09/2010 Stinolact 10mg Tabs Eurodrug One At...

Consultation Notes Add New
 PM General 11/08/2010 12:46
 Vaccination
 PM General 11/08/2010 10:04
 Jd
 PM General 11/08/2010 10:03
 bp 142/78
 PM General 11/08/2010 09:47
 enr
 PM General 11/08/2010 09:30
 Prescription review: uickmokm, iokm

Tests Add New
 Title (Most Recent Date) Previous Current
 Height(17/06/2010) 120.00 -30.23%
 BMI(17/06/2010) 38.89 51.38%
 Weight(17/06/2010) 56.00 -26.32%
 Pulse(14/06/2010) 140.00
 Smoking(17/06/2010) True
 Alcohol units a week(1... 5

Medical History Add New
 11/08/2010 yfnytygrytag
 01/07/2010 (N18.0)End-stage renal disease
 test renewsel
 17/06/2010 (K84)HEART DISEASE OTHER
 iselsd
 17/06/2010 (R96)ASTHMA
 14/06/2010 (L95)OSTEOPOROSIS
 14/06/2010 (L15.4)Pneumonia due to other stre...
 14/06/2010 .TODDIABETES_NOMINSULIN DEPEND

Recall Opportunities Add New
 Mammography (Appointment Made) 07/08/2010
 Diabetes Check Up (Not Notified Yet) 03/01/1983
 Flu Vaccine (Not Notified Yet) 03/01/1983
 INR (Not Notified Yet) 17/06/2011
 Cervical Smear (Not Notified Yet) 15/06/2012
 Last Result P2: Negative/NAD (16/12/2009)

To add an account simply click on the Accounts tab on the ribbon at the top. The following screen will open;

HelixPractice Manager - Helix Health Medical Centre: pm

Waiting Room Appointments Patient Reports Tasks Administration Help

Search Add New Health Summary Consultation Notes Medication Medical History Immunisations Exams Protocols Recalls HL7 Messages Documents Sketch Accounts Finalise

Patients Consultation Clinical Documents Accounts

Blagoev, Joe (F) 3M 0W 12/10/2010 (Manchester City, Manchester, England) Family GMS :1234566 -

Alerts: Please see Alert Section for more detail
Drug Allergies:
Other Allergies: Bird Allergy
Identifiers: Dr Eoin Test

Accounts

Personal Outstanding Amount: €0.00 Credit Remaining: €0.00
 Total Outstanding Amount: €100.00

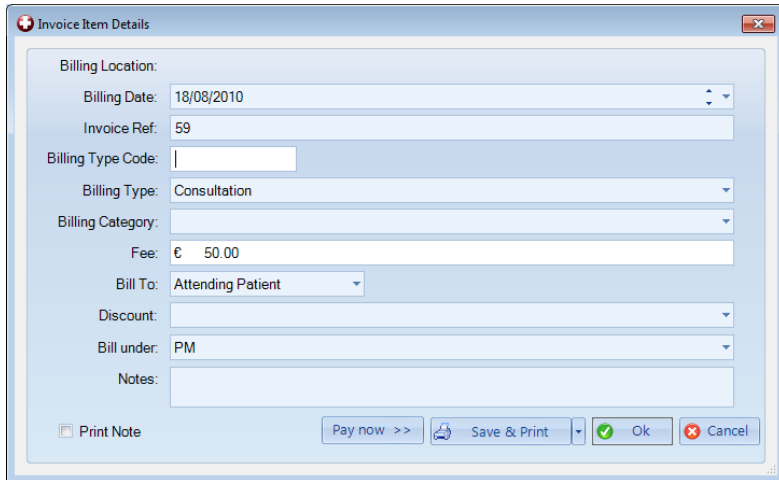
Personal Items All Items

Billing Date	Billing Type	Fee	Outdun Inv Nbr	Notes
07/01/2011	Consultation	50.00	50.00	10
10/11/2010	Consultation	50.00	50.00	6
10/11/2010	Consultation	50.00	0.00	5
10/11/2010	Consultation	50.00	0.00	4

Create form Invoice Receipt Transactions Company Close

Adding an Invoice and Receipt to a Patient Chart

To add an invoice click on the ADD button at the bottom of the screen.



- **Billing Date** – This will default to today's date but can be changed
- **Invoice Ref** – *this is the number of the Invoice*
- **Billing Type Code** – *This is where you enter the Code either an insurance or own code.*
- **Billing Type** – This will default to Consultation but can be changed by using the search option
- **Billing Category** – *Select from the list*
- **Fee** – Is the predefined fee for this type – it can be changed for this consultation by just changing the amount
- **Bill To:** When you register a patient you can set them up so somebody else pays their bills. E. g. A child or a company account or select insurance company here also.

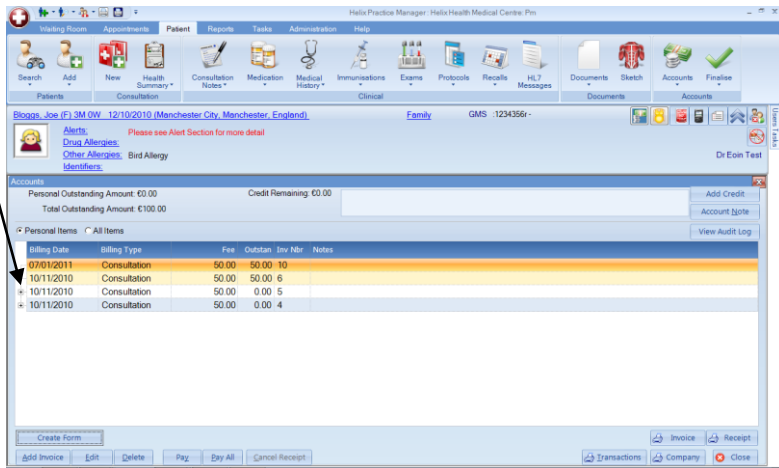
- **Discount:** Select the required VHI discount where appropriate.
- **Notes** – You may free text any account information here

Once the information has been entered you can click on

- **OK** – This saves the invoice but does NOT pay it. If a patient does not pay on the day you click on OK
- **Save and Print** – This will save the information and print an invoice to give to the patient.
- **Pay Now** – This means that the attendee is paying the invoice today. Once you click this the following screen opens;

- **Payment Type** – This defaults to cash by can be changed by using the drop down to credit card etc.
- **Waived** – If there is an amount to be waived enter the amount to be waived in the waived box. This will automatically adjust the total in the Amount section
- **Paid By** – select the correct person from this list
- **Retention Tax** – tick box to apply tax (this can be edited in administration, practice configuration and select the practice settings tab)
- **Save & Print** – If you wish to print a receipt click on Save and Print
- **OK** – This saves the receipt without printing it.

All invoices can be viewed by clicking on the Accounts tab within the patient record. If an invoice has been paid it will have + sign beside it. Click on the + sign to view details of the receipt.



Edit an invoice by clicking on Edit and making any necessary changes

Delete will delete the highlighted invoice

Pay will pay an individual invoice. Highlight the invoice and simply click Pay

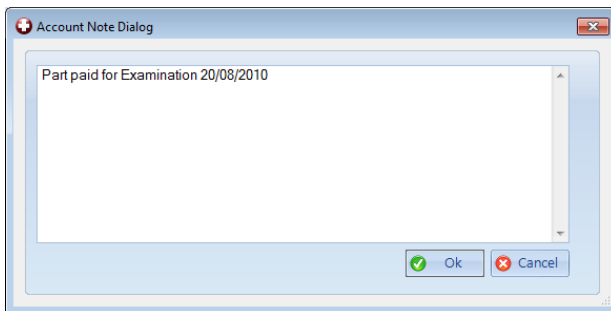
Pay All – If a patient or a company runs an account you can click on Pay All to pay multiple invoices

Cancel Receipt – Select a receipt and click this button to cancel a receipt, e.g. for refunds.

Create Form - be used when you require accounts information to be populated onto forms, e.g. vhi claim form.)

Account Notes

You can add notes to the patient's account using the Account Note option:



Within the accounts module you will see two options on the screen for Personal Items and All Items

Accounts

Personal Outstanding Amount: €50.00 Credit Remaining: €0.00

Total Outstanding Amount: €50.00

☒ Personal Items ☐ All Items

Buttons: Add Credit, Account Note, View Audit Log

Billing Date	Billing Type	Fee	Outstan	Inv Nbr	Notes
03/08/2010	Consultation	50.00	50.00	56	
17/06/2010	Consultation	50.00	0.00	41	
17/06/2010	Consultation	50.00	0.00	40	
14/06/2010	Sickness Certif...	15.00	0.00	36	
14/06/2010	Employment M...	100.00	0.00	35	
14/06/2010	Blood Test	25.00	0.00	34	
09/06/2010	Consultation	50.00	0.00	31	
09/06/2010	Consultation	50.00	0.00	30	waive
09/06/2010	Consultation	50.00	0.00	29	

Buttons: Add Invoice, Edit, Delete, Pay, Pay All, Cancel Receipt, Company Invoice, Print, Transactions, Close

Credit Note

You can add credit to a patient's account using the Add Credit button.

Credit Amount

Credit Amount: € 0.00

Buttons: Ok, Cancel

Patients with an outstanding balance on their account will not be able to add credit to their account.

Helix Practice Manager

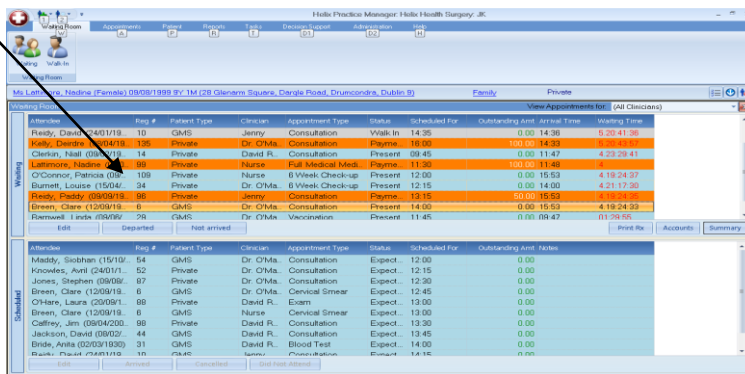
You cannot credit an account with an outstanding balance.

OK

Personal Items - Are items for that patient only

All Items – Are items related to that patient e.g. invoices for their children and invoices paid by a third party and personal items

If there is money outstanding this will show in the outstanding column within accounts and will also show in the Waiting Room when the patient makes a new appointment.



Attendee	Reg #	Patient Type	Clinician	Appointment Type	Status	Scheduled For	Outstanding Amt	Arrival Time	Waiting Time
Reddy, David (2401/19)	10	GMIS	Jenny	Consultation	Walk-In	14:35	0.00	14:35	5:20:41:35
Reddy, David (2401/19)	10	Private	Dr. O'Ma	Consultation	Paymte	16:00	107.00	14:35	5:20:41:35
Chen, Neil (0000/14)	14	Private	David R.	Consultation	Present	09:45	0.00	11:47	4:21:28:41
Lattimore, Nadine	99	Private	Nurse	Full Medical Med.	Paymte	11:30	100.00	11:48	4:21:28:41
O'Connor, Patricia (09/108)	108	Private	Nurse	6 Week Check-up	Present	12:00	0.00	15:53	4:19:24:37
Burnett, Louise (1500/04)	04	Private	Dr. O'Ma	6 Week Check-up	Present	12:15	0.00	14:00	4:21:17:30
Reddy, David (0909/19)	96	Private	Jenny	Consultation	Paymte	13:15	50.00	15:53	4:19:24:37
Eileen, Clare (1209/19)	6	GMIS	Dr. O'Ma	Consultation	Present	14:00	0.00	15:53	4:19:24:37
Remond, Linda (0909/09)	09	GMIS	Dr. O'Ma	Vaccination	Present	11:45	0.00	09:47	01:24:25

Accounts | Waiting Room | Reports | Tools | Incoming Letters | Information | Links

My Location: Helix (Female) (0909/1999) 87, 1M (28 Glenasmole Square, Dargle Road, Drumcondra, Dublin 9) Family Private

View Appointments for: (All Clinicians)

Waiting Room | Accounts | Summary

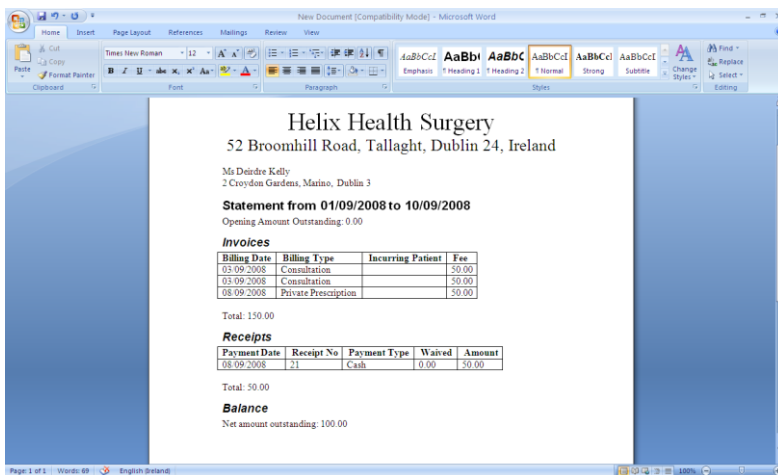
Print Rx | Accounts | Summary

Printing an Account Statement

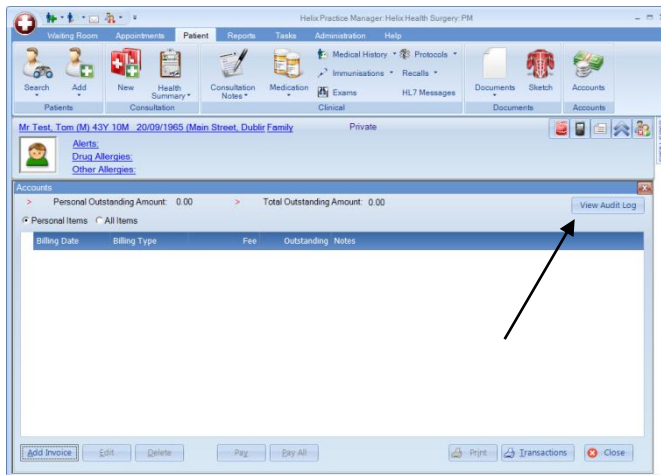
To print a statement for a patient click on Transactions at the bottom of the screen.

The system will ask you to enter a date range

Enter the date range and click OK



If a user needs to see who has entered or edited any accounting details, the Audit Log can be used.



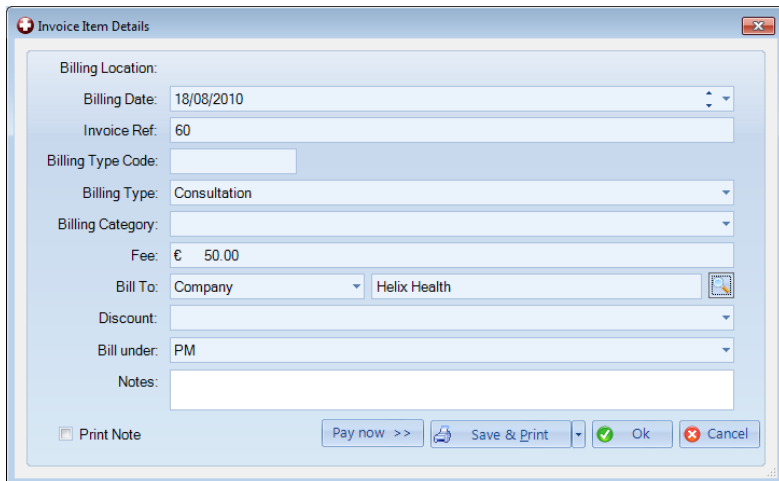
Company Accounts

If the patient is not being charged for a consultation or treatment, Invoices can be assigned to a company instead of to the patient.

Bill to a company

To assign a bill to a company open the associated patient file and go to the accounts section. Click Add Invoice and enter the bill type and fee as normal.

Change the 'Bill To' option to Company. A new field will appear where you can search for a specific company to Bill.



The screenshot shows a software window titled "Invoice Item Details". It contains the following fields and controls:

- Billing Location: (empty)
- Billing Date: 18/08/2010 (dropdown)
- Invoice Ref: 60 (text input)
- Billing Type Code: (empty)
- Billing Type: Consultation (dropdown)
- Billing Category: (empty)
- Fee: £ 50.00 (text input)
- Bill To: Company (dropdown) with a search icon and "Helix Health" (text input)
- Discount: (empty)
- Bill under: PM (dropdown)
- Notes: (empty text area)
- Print Note (checkbox)
- Pay now >> (button)
- Save & Print (button with dropdown arrow)
- Ok (button with green checkmark)
- Cancel (button with red X)

Click OK to leave the invoice as outstanding. In the patients account there is a balance for Personal items and total items. The personal outstanding balance will not reflect items that were charged to a company.

You can pay off an invoice that was billed to a company in two ways:

1. From the patient account, select the invoice and click Pay. The Paid By field will automatically show the company name.
2. From the company Accounts section detailed below

To view a company account, go to Administration in the main ribbon also then select Company Accounts. To view/Manage an account, type in the name of the company in the search field and click Search. The company name should appear, select it and click Manage to view the account. You will see the following:

Helix Practice Manager - Helix Health Surgery: pm

Waiting Room Appointments Patient Reports Tasks Administration Help

Users Other Settings IPU Update Practice Formulary User Added Drugs Drug Substitution External Contacts Templates Form Download HL7 Tests Heart/Vatch Data Export Protocols Export Current Patient Company Accounts Company

Test, Baby (F) 6M 2W 01/02/2010 (Main Street, Dublin) 01 Family Private

Company Accounts

Add Credit Amount Total Outstanding Amount: 200.00 From Date: 19/07/2010 Filter

Credit Remaining: £0.00 To Date: 19/08/2010

Billing Date	Billing Type	Fee	Outstanding	Created For	Bill To
19/08/2010	Consultation	50.00	50.00	Test, Baby 01/02/2010	Helix Health
19/08/2010	Exam	50.00	50.00	Hughes, Mary 14/10/2007	Helix Health
19/08/2010	Consultation	50.00	50.00	Tevez, Carlos 09/09/1983	Helix Health
19/08/2010	Consultation	50.00	50.00	test, amy 09/08/1965	Helix Health

Delete Pay Pay All Print Transactions Close

A list of all outstanding invoices billed to the company will be shown including the billing date, Type, Fee and the relative Patient. You can use the date filter at the top of this screen to view invoices from a certain time frame.

To pay off an invoice, simply select it from the list and click Pay, or use the Pay All button to pay off all invoices at once.

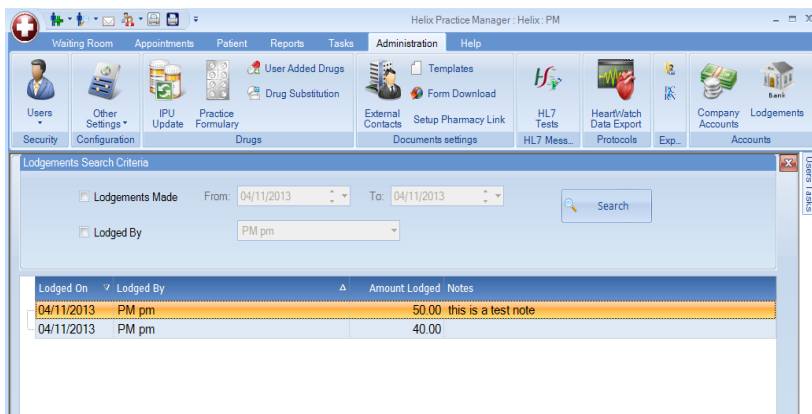
Use the Print button to reprint any invoices listed. The Transactions button can be used to print of a statement of the account.

Lodgements

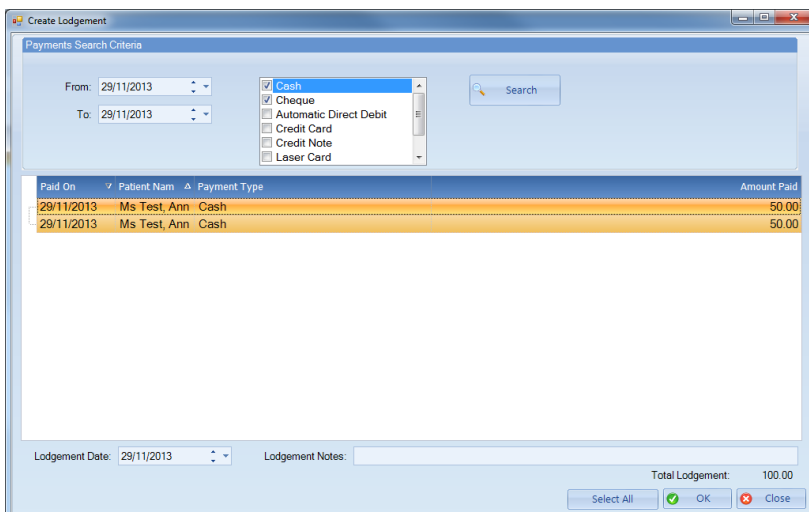
In administration, there is a new option for lodgements.



Users would use this feature to capture how much money they have lodged to a financial institution. On the lodgements screen, users can filter for lodgements made between certain dates and who made the lodgements. There is a role for restricting users to view, add, edit and delete lodgements.



To add a lodgement, the user would click on the 'add' option and the following screenshot will appear

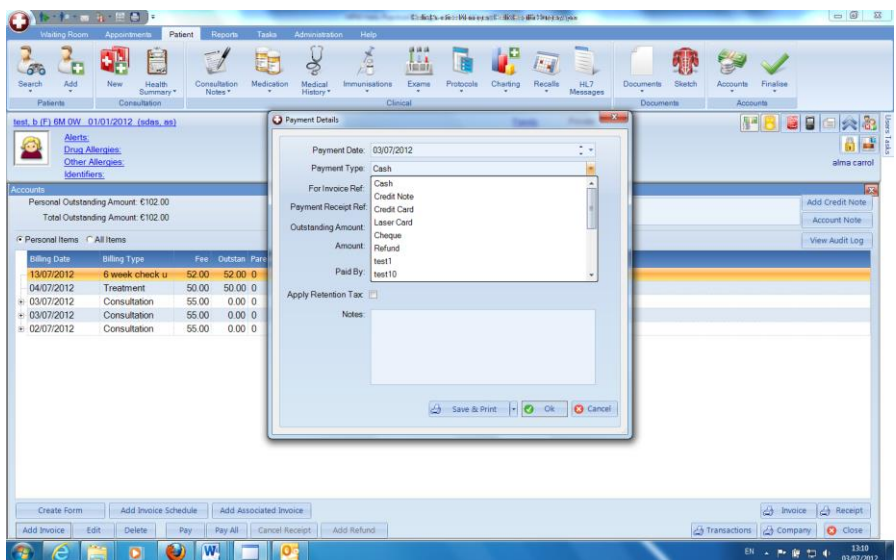


This will search for any payments received within a given date range. The user should highlight the payments to lodge and click ok.

There is also an option at the bottom of the lodgement screen to print a list of the lodgements currently selected.

Credit Card Integration

There is now an option to integrate a Credit Card machine with HPM. Now when selecting **"Laser"** or **"Credit Card"** as the invoice type when paying an invoice, it will default the payment through the terminal.



The below screen should now follow after you choose to pay which will show the details of the transaction.

The screenshot shows a software window titled "Helix Health Ltd. Electronic Payment Processor". It contains two main sections: "Transaction Details" and "Transaction Progress".

Transaction Details:

- Transaction Type: Purchase (dropdown menu)
- Cardholder Present: Yes (dropdown menu)
- Amount: 50.0000 (text input)
- Cash Back: 0 (text input)
- Account ID: dee8d433-c0b5-49a4-887f-23c (text input)
- Reference: 5c41c97f-2b89-4b2d-acf6-13b (text input)

At the bottom right of the details section are two buttons: "Process Transaction" and "Close".

Transaction Progress:

A text area below the "Process Transaction" button displays the following message:

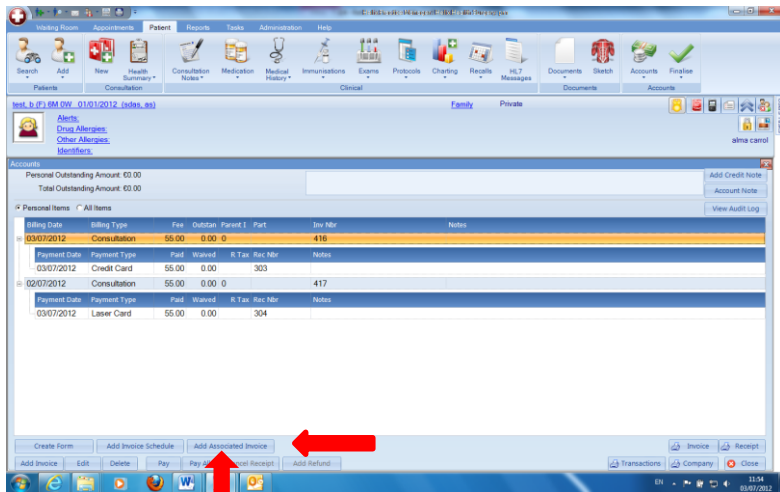
```
Sending Transaction to Terminal...  
Could not connect to Credit Card Terminal
```

Once the “Process Transaction” button is selected, The Credit Card Terminal then interacts with the Helix Practice Manager Application & charges the payment to the credit card/laser card. The system will then print terminal receipt and the receipt from HPM.

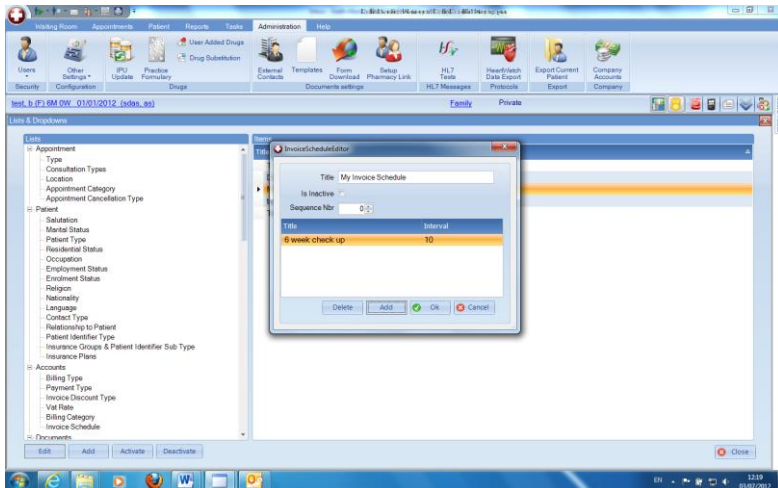
Invoice Schedule

In the accounts screen, there is now an option for “**Invoice Schedule**”. When you click this button as shown below in

the screenshot, it will create multiple invoices over a desired time schedule, e.g. you know a patient will have a consultation today, then in 30 days' time, then 60 days' time. In this example, 3 invoices will be created, one with invoice date of today, then invoice date in 30 days' time and then invoice date in 60 days' time.



A user can create their own "Invoice Schedule" by using the "add function" from the Administration section >List & Drop Downs> Invoice Schedule as shown in the screenshot below:



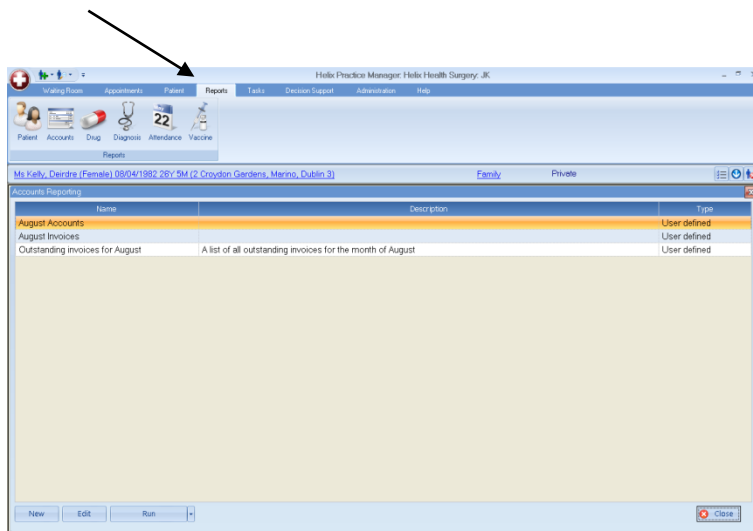
The interval is the number of days away that the invoice schedule will be set up for i.e. 1 day, 7 days, 30 days.

Note: The Type of "Invoice Schedule" needs to be added first & then the Invoice Schedule needs to be re-opened again & now the billing type as needed.

Account Reporting

Click on Reports on the top ribbon.

Click on Accounts – this will open the accounts reporting module.

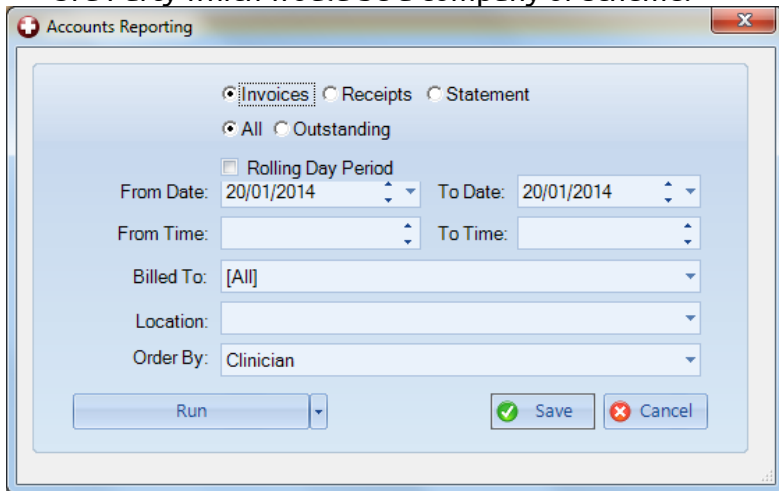


Reports that you have previously created are listed here and can be edited or run again by clicking on Edit or Run.

Adding a New Report

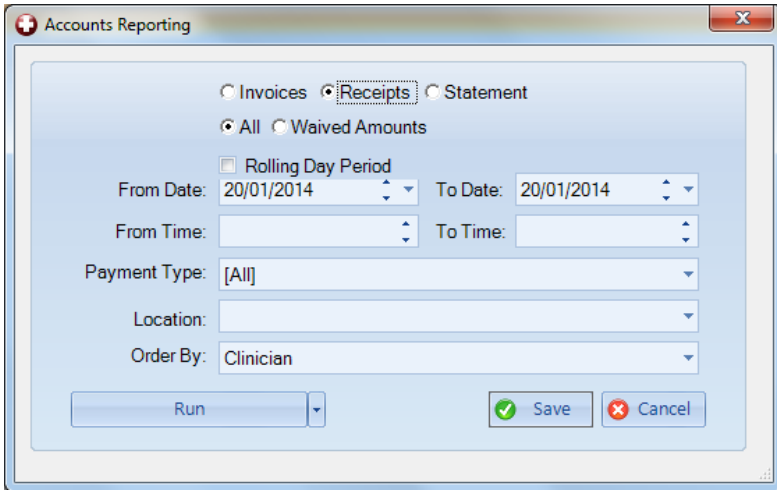
- Click on New

- Enter in criteria – for invoices you can search by Outstanding or All within a date range and for receipts you can search by All or just waived amounts
- From invoices you will see a drop down for Billed to – This allows you to narrow down the search to self, Other Patient e.g. children's, wives accounts etc and 3rd Party which would be a company or scheme.



The screenshot shows a window titled "Accounts Reporting" with a close button (X) in the top right corner. Inside the window, there are three radio buttons for "Invoices", "Receipts", and "Statement", with "Invoices" selected. Below these are two radio buttons for "All" and "Outstanding", with "All" selected. A checkbox for "Rolling Day Period" is present and unchecked. There are two date fields: "From Date:" with the value "20/01/2014" and "To Date:" with the value "20/01/2014". Below the dates are two time fields: "From Time:" and "To Time:", both empty. There is a dropdown menu for "Billed To:" with the value "[All]". Below that is a dropdown menu for "Location:" which is empty. There is a dropdown menu for "Order By:" with the value "Clinician". At the bottom left is a "Run" button with a dropdown arrow. At the bottom right are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

- If you click on Receipts it will give you the option to narrow down the search by Payment Type or All.



The image shows a software window titled "Accounts Reporting". It contains several options and input fields. At the top, there are three radio buttons: "Invoices", "Receipts" (which is selected), and "Statement". Below these are two more radio buttons: "All" (selected) and "Waived Amounts". There is a checkbox labeled "Rolling Day Period" which is currently unchecked. Below the checkbox are two date pickers: "From Date:" set to "20/01/2014" and "To Date:" set to "20/01/2014". Below the dates are two time pickers: "From Time:" and "To Time:". Below the times is a dropdown menu for "Payment Type:" with "[All]" selected. Below that is a dropdown menu for "Location:". Below the location is a dropdown menu for "Order By:" with "Clinician" selected. At the bottom left is a "Run" button with a dropdown arrow. At the bottom right are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

- There is also an option for Time, this can be useful for sites who wish to get a breakdown of what invoices / receipts were generated before and after a certain time rather than just by day.
- Location – You can filter by location, for users with multiple surgery locations.
- Order By - The reports can be ordered by date and time or raised by clinician.
- Once you have selected your criteria click on Run
- This will open a document which can be edited as you wish.

Receipt Status Report

Report on all payments received from 08/09/2008 to 08/09/2008

Surgery: Helix Health Surgery

52 Broomhill Road, Talaght, Dublin 24, Ireland

Date Generated: 08/09/2008

Paid By	Payment Date	Paid By	Payment Type	Billing Type	Receipt Number	Amount	Waived	Total
Kerry Derrida	08/09/2008	Kerry Derrida	Cash	Consultation	21	50.00	0.00	50.00
Kerry Derrida	08/09/2008	Helix Health	Cash	Private Prescription	22	50.00	0.00	50.00
Lattinack Yedra	08/09/2008	Lattinack Yedra	Cash	Consultation	11	50.00	0.00	50.00

Payment Type	Amount	Waived	Total
Cash	350.00	50.00	400.00
Cheque	50.00	0.00	50.00
Credit Card	25.00	25.00	50.00

Overall Amount: 425.00
Overall Waived: 75.00
Overall Total: 500.00

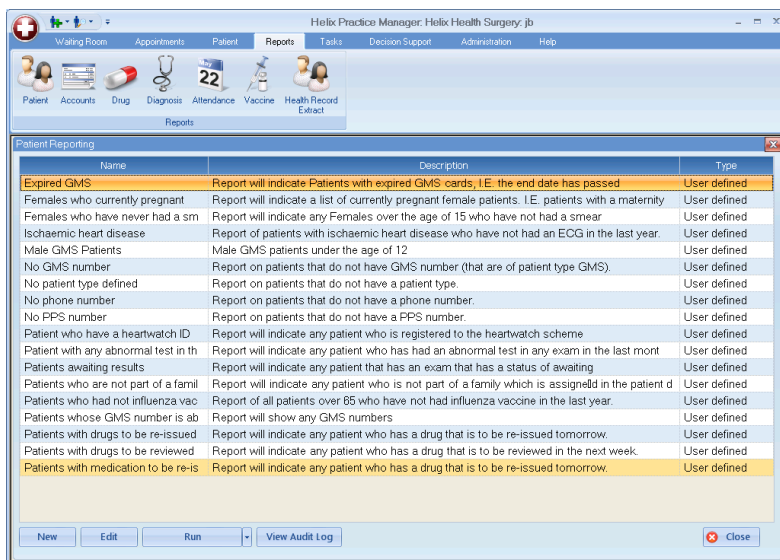
Page: 1 of 1 | Words: 102 | English (Ireland)

Reports

By clicking into the Reports tab in the main ribbon, you can enter the reports section. This section allows you to create and run reports which extract information from the database from a number of areas such as patient's details, medications, appointments, etc.

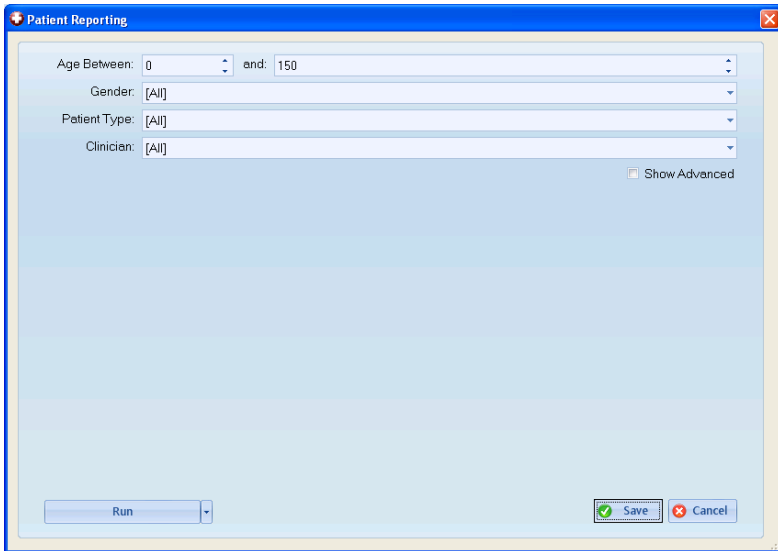
Patient Reports

To create and run a report on patients, select the Patient option in the reports ribbon.



Here you will see a list of previously created reports that have been saved. To create a new report, select New.

You will see the screen below.



The screenshot shows a software window titled "Patient Reporting" with a blue header bar. Inside the window, there are four filter criteria: "Age Between:" with input fields for "0" and "150", "Gender:" with a dropdown menu set to "[All]", "Patient Type:" with a dropdown menu set to "[All]", and "Clinician:" with a dropdown menu set to "[All]". To the right of these filters is a checkbox labeled "Show Advanced". At the bottom left is a "Run" button with a dropdown arrow. At the bottom right are "Save" and "Cancel" buttons, each with a small icon (a green checkmark for Save and a red X for Cancel).

There are a number of criteria which can be used in your report:

- Age
- Gender
- Patient Type
- Clinician

Once the required details for your report have been set, you can Run the report to see the list of patients who meet those criteria. The list will open in Word in the form of a table, which you can print by selecting the Print icon.

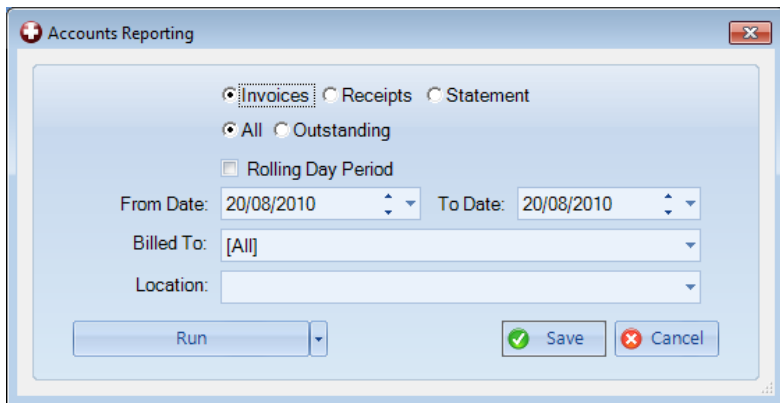
Alternatively you can export the results into Excel format by clicking the drop down list beside Run and selecting Export to Excel.

Finally when the report has been printed or saved to excel, you can click Save to save this report so it can be used again, or cancel if you do not want to save the report.

Accounting Reports

If you have been using the Account section in the Patients details, you can run a number of reports on those accounts.

Click on the Accounts tab in the reports section to see the following screen:



First, choose to base you report on either Invoices or Receipts

- If you choose Invoices,:
 - You can select to view All or just Outstanding invoices.
 - Then select the Date range
 - Finally choose who the invoices are billed to.
 - You can filter the report by location

- There is an option for Rolling Day Period. This means that if you save a report that you will be running daily, the date will automatically roll forward each day, so there is no need to edit the report each time its run.
- If you choose Receipts:
 - You can select to view All or Waived Amounts.
 - Then you can specify the required date range
 - Lastly, choose the payment type you are looking for.

There is also an option to print a full statement; this will include both invoices and receipts.

When the selection has been made, click Run to open the report in Word for printing, or Export to Excel to send the list to Excel.

Click Save to save the report to be used again at a later time, or Cancel if you will not need to run it again

Drug Reports

This section allows you to run reports on any prescriptions recorded in patient's files in the medication section.

To create a new report, open the Drug tab in the reports section and click New.

The screenshot shows the 'Drug Reporting' window. The 'Patients' section includes date pickers for 'Prescribed From Date' (22/01/2012) and 'Prescribed To Date' (22/02/2012), a range selector for 'Age Between' (0 to 150), and a dropdown for 'Gender' ([All]). The 'Drugs' section features checkboxes for 'Wild Card Brand Search', 'Include Inactive Medications', and 'Include Generic'. It also has a 'Show' section with radio buttons for 'All' and 'Any', and a 'SortBy' section with radio buttons for 'Patient Name' and 'Drug Name'. Below these is a table with columns 'Drug Name', 'Form', and 'Strength'. At the bottom, there is a 'Drug:' dropdown menu, an 'Add' button, a 'Delete' button, a 'Run' button, and 'Save' and 'Cancel' buttons.

First you must fill in the criteria of the types of patients you want the report to focus on which includes:

- Prescribed Date
- Age
- Gender

The screen below this is where you enter in the specific drug(s) that you want to search for.

There are 3 checkboxes that will help you search for the drugs they are as follows -

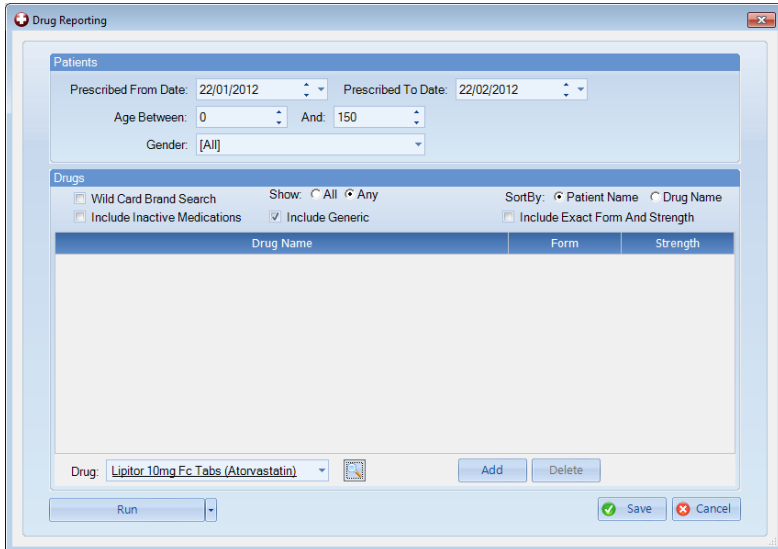
- Include Generic – this is to do a search for patients on a particular brand name e.g. Disprin Direct Tabs (Aspirin) [RECKITT] and you check the box for 'Include Generic', it will include any patients on the generic drug name (in this example Aspirin) so

patients on drug name Nuseals Aspirin 300mg Tabs (Aspirin) [ALLIANCE] will be included on the report.

- Include Exact Form and Strength – this will only be available when 'Include Generic' has been checked. When checked, only patients on the exact same form and strength of the drug will be returned, e.g. Tabs and 300mg. NOTE: When you use 'Include Generic' checkbox the generic name has to be the exact same.
- Wild Card Brand Search – there is also an option that you can free text in the brand drug name (no need to search for it in the pre-defined IPU list). For example you can type in 'lipitor' and the search result will return patients on Lipitor 10mg Chewable Tabs (Atorvastatin) [PFIZER], Lipitor 80mg Fc Tabs B&s (Atorvastatin) [B&S HEALTH], etc (basically any brand name where the word lipitor is mentioned). NOTE: you can only free text in one wild card brand.
- Include inactive medications - This is not checked as default to prevent the same person's name coming up multiple times on the report if they were re-issued a drug many times as these drugs would be inactive.

If you would like to do a search on a particular brand name only, e.g. Lipitor 80mg Fc Tabs B&s (Atorvastatin) [B&S HEALTH] you use the drug search option at the bottom of the screen

Click on the Search button , to find the exact drug.



The screenshot shows the 'Drug Reporting' window. It has two main sections: 'Patients' and 'Drugs'. The 'Patients' section includes filters for 'Prescribed From Date' (22/01/2012), 'Prescribed To Date' (22/02/2012), 'Age Between' (0 to 150), and 'Gender' ([All]). The 'Drugs' section has checkboxes for 'Wild Card Brand Search', 'Include Inactive Medications', and 'Include Generic' (checked). It also has 'Show' options for 'All' (unchecked) and 'Any' (checked), and 'SortBy' options for 'Patient Name' (checked) and 'Drug Name' (unchecked). Below these is a table with columns 'Drug Name', 'Form', and 'Strength'. At the bottom, there is a 'Drug' dropdown menu showing 'Lipitor 10mg Fc Tabs (Atorvastatin)', an 'Add' button, a 'Delete' button, a 'Run' button, and 'Save' and 'Cancel' buttons.

Drug Name	Form	Strength
-----------	------	----------

Click Add to add the drug you selected to the report criteria. You can add in as many drugs as you need this way.

Above the list of selected drugs, there are two sorting options:

- Show All/ Any – This option means that when you run the report, it will search for patients who have either all of the drugs in the list, or who have had any one or more of the selected drugs.
- Sort By – You can choose the order the list will appear, either alphabetically by patient name, or by drug name.

When the selection has been made, click Run to open the report in Word for printing, or Export to Excel to send the list to Excel.

Click Save to save the report to be used again at a later time, or Cancel if you will not need to run it again.

Diagnosis Reports

This option in the reports section allows you to run reports based on details entered on a patients History.

Click New and you will see the screen below:

Diagnosis Reporting

Patients

Diagnosed From Date: 22/10/08 Diagnosed To Date: 22/10/08

Age Between: 0 and: 150

Gender: [All]


Medical Conditions

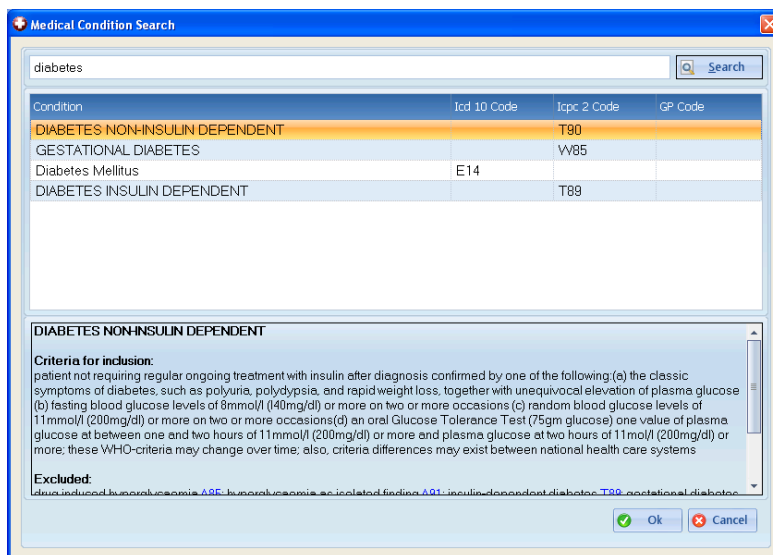
Show: ☒ All ☐ Any SortBy: ☒ Patient Name ☐ Condition Name

Condition Name	Code
----------------	------

Condition:

The first section allows you to specify patient's criteria to focus on in the report with details like: diagnosis date, age and gender.

The second section is where you enter the actual diagnosis that you are searching for. Type in the name of the condition and click on the Search button .



The dialog box titled "Medical Condition Search" has a search input field containing "diabetes" and a "Search" button. Below the input field is a table with four columns: Condition, Icd 10 Code, Icd 9 Code, and GP Code. The table lists four conditions: "DIABETES NON-INSULIN DEPENDENT" (highlighted in orange), "GESTATIONAL DIABETES", "Diabetes Mellitus", and "DIABETES INSULIN DEPENDENT". Below the table, there is a section for "DIABETES NON-INSULIN DEPENDENT" with "Criteria for inclusion:" and "Excluded:" text. At the bottom are "Ok" and "Cancel" buttons.

Condition	Icd 10 Code	Icd 9 Code	GP Code
DIABETES NON-INSULIN DEPENDENT		T90	
GESTATIONAL DIABETES		VV85	
Diabetes Mellitus	E14		
DIABETES INSULIN DEPENDENT		T89	

DIABETES NON-INSULIN DEPENDENT

Criteria for inclusion:
patient not requiring regular ongoing treatment with insulin after diagnosis confirmed by one of the following (a) the classic symptoms of diabetes, such as polyuria, polydipsia, and rapid weight loss, together with unequivocal elevation of plasma glucose (b) fasting blood glucose levels of 8mmol/l (140mg/dl) or more on two or more occasions (c) random blood glucose levels of 11mmol/l (200mg/dl) or more on two or more occasions (d) an oral Glucose Tolerance Test (75gm glucose) one value of plasma glucose at between one and two hours of 11mmol/l (200mg/dl) or more and plasma glucose at two hours of 11mmol/l (200mg/dl) or more; these WHO-criteria may change over time; also, criteria differences may exist between national health care systems

Excluded:
diabetes-induced hyperkalemia A95; hyperkalemia as isolated finding A91; insulin-dependent diabetes T90; gestational diabetes

Ok Cancel

Select the condition you want to use and click ok. Click Add to add this to your report criteria. You can add in more than one condition if needed in the same way.

Just above the list of selected conditions, there are two options:

- Show All/ Any – This option means that when you run the report, it will search for patients who have either all of the conditions in the list, or who have been diagnosed with one or more of the selected conditions.

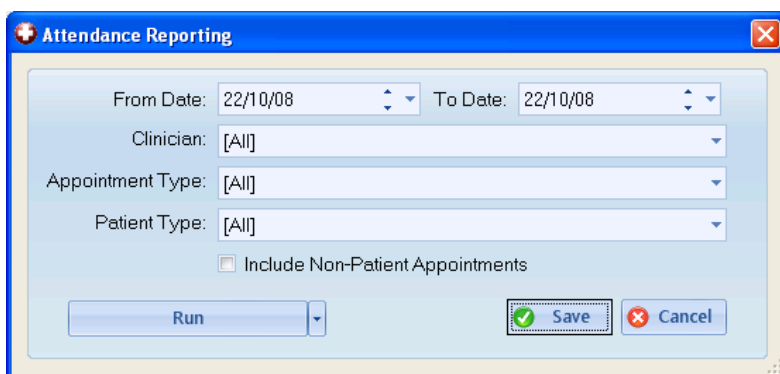
- **Sort By** – You can choose the order the list will appear, either alphabetically by patient name, or by criteria name.

When the selection has been made, click Run to open the report in Word for printing, or Export to Excel to send the list to Excel.

Click Save to save the report to be used again at a later time, or Cancel if you will not need to run it again.

Attendance Reports

This section of reports will allow you to run reports based on appointments made in the appointment section.

A screenshot of the 'Attendance Reporting' dialog box. The dialog has a blue title bar with a red cross icon on the left and a red 'X' icon on the right. The main area is light blue and contains several input fields: 'From Date:' with a date picker showing '22/10/08', 'To Date:' with a date picker showing '22/10/08', 'Clinician:' with a dropdown menu showing '[All]', 'Appointment Type:' with a dropdown menu showing '[All]', and 'Patient Type:' with a dropdown menu showing '[All]'. Below these fields is a checkbox labeled 'Include Non-Patient Appointments' which is currently unchecked. At the bottom, there is a 'Run' button with a dropdown arrow, a 'Save' button with a green checkmark icon, and a 'Cancel' button with a red 'X' icon.

Fill on or more of the following details:

- **Date** – The date the appointment was made

- Clinician – Who the appointment was for (doctor/nurse name)
- Appointment Type – What kind of appointment was it (blood test, vaccine, etc)
- Patient Type – here you can specify to search for GMS or private patients for example.

You can also choose to include in the report list, any appointments that were made for a patient not registered with the surgery.

When the selection has been made, click Run to open the report in Word for printing, or Export to Excel to send the list to Excel.

Click Save to save the report to be used again at a later time, or Cancel if you will not need to run it again

Vaccine Reports

In this section of reports, you can search for patients who have received and vaccines that have been recorded in their patient charts.

Vaccine Reporting

Patients

From Date: 22/10/08 To Date: 22/10/08

Age Between: 0 And: 150

Gender: [All]

Clinician: [All]

☐ Show one patient per page

Vaccines

Show: ☒ All ☐ Any SortBy: ☒ Patient Name ☐ Vaccine ☐ Batch

Vaccine Type	Vaccine Name	Batch Number
--------------	--------------	--------------

Vaccine Type: [] Vaccine: [] Batch Number: [All]

Add Delete

Run Save Cancel

In the first section you can specify the patient criteria for your search these include:

- Date
- Age
- Gender
- Clinician

The next section is where you enter the actual vaccine(s) that you want to search for. Choose the vaccine type and the specific vaccine from the drop down list. You can also specify a particular batch number if needed. Click Add to add this to you search.

Just above the list of selected vaccines, there are two options:

- Show All/ Any – This option means that when you run the report, it will search for patients who have had either all of the vaccines in the list, or who have had with one or more of the vaccines in the list.
- Sort By – You can choose the order the list will appear, either alphabetically by patient name, by vaccine name or by batch.

When the selection has been made, click Run to open the report in Word for printing, or Export to Excel to send the list to Excel.

Click Save to save the report to be used again at a later time, or Cancel if you will not need to run it again.

Personal Accounts

The personal accounts reports work in the same way as the standard account reports. However when a report is run from here, it will only give the invoices/receipts of the logged on user.

Ad-Hoc Reports

Introduction

This section of the manual is a guide on how to use the new ad hoc reporting tool that is now being provided with Helix Practice Manager.

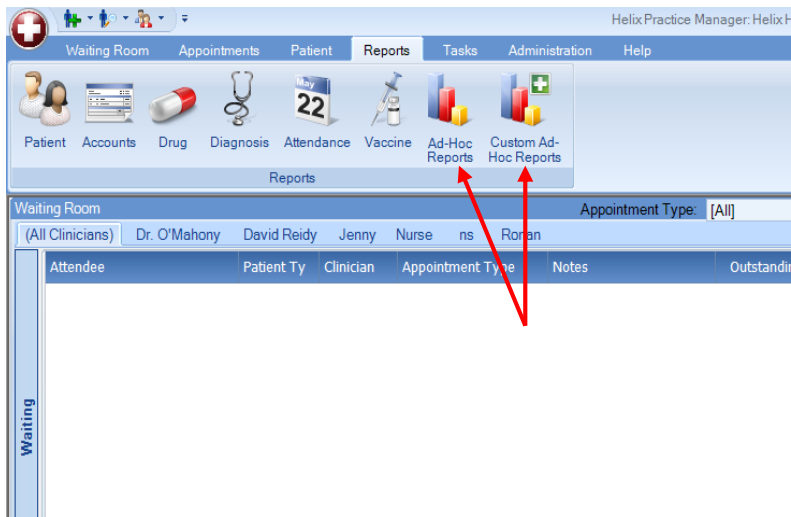
Reporting Services are being used to provide a set of standard reports and a report builder is also available that will allow the user to create their own customised reports. The report builder is based on drag and drop. The user will have a set of fields available to them (from various database tables) and will be able to use these fields and create filters against them to create whatever type of report they require.

Running Existing Reports

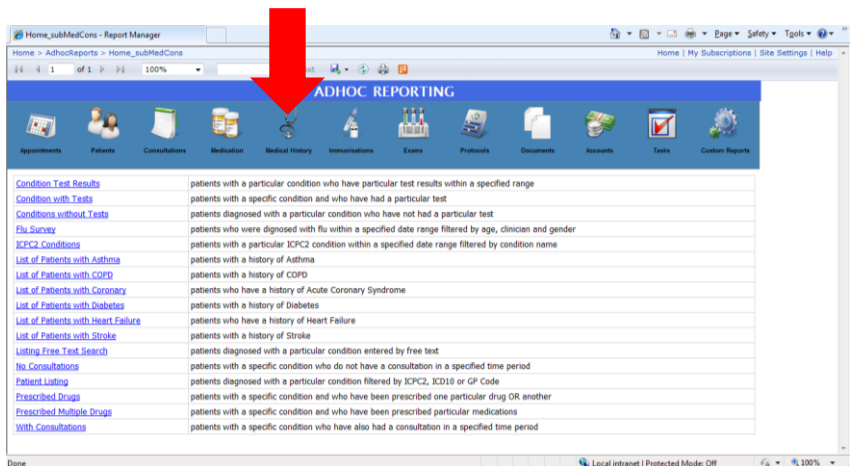
To access your Adhoc Reports, click on the Reports tab in HPM. There are two options here for Adhoc reports:

- Ad-Hoc Reports – Click here to access the standard Ad-hoc Reports
- Custom Ad-Hoc Reports – Click here to create your own reports or accessed custom made reports.





The default reports are divided up into categories, clicking on the in the icon will display the list of reports within that category and some detail on what the report is looking for



To run an existing report the user clicks once on the report they wish to run.

Most reports will have a filter at the top where you can enter in specific information to get a more customised report, for example in the condition box below you can enter in any condition. Enter in all the required fields and then click on the 'View Report' button.

MedCon ICPC2 Conditions - Report Manager

Home > AdhocReports > MedCon ICPC2 Conditions

DateFrom 01/03/2012 DateTo 06/03/2012

Condition Asthma Show InActive Patients No

View Report

Once the report has been run, there are several options available to the user -

New Subscription

Consultation between 01/06/2010 and 21/06/2012

Born between 01/01/1900 and 21/06/2011

User dr, Dr2, jones, locum, mary y, N Patient Type Company Scheme, EU, GMS, GN

Show InActive Patients ☐ True ☒ False

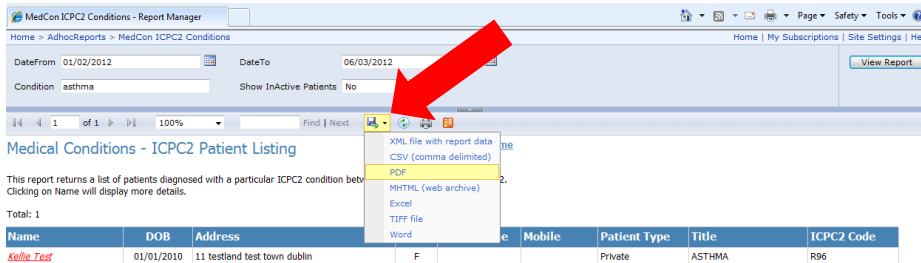
1 of 8 100% Find | Next Select a format Export

General Consultat Last Page Home

This report returns a list of patients who had a consultation between 01/06/2010 and 21/06/2012 filtered by User with the results broken down

Use the arrows shown above to scroll through reports with multiple pages, or go straight to the last page.

Use the Zoom drop down option to zoom in or out of the report.



MedCon ICPC2 Conditions - Report Manager

Home > AdhocReports > MedCon ICPC2 Conditions

DateFrom: 01/02/2012 DateTo: 06/03/2012

Condition: asthma Show InActive Patients: No

View Report

1 of 1 100% Find | Next

Medical Conditions - ICPC2 Patient Listing

This report returns a list of patients diagnosed with a particular ICPC2 condition between two dates. Clicking on Name will display more details.

Total: 1

Name	DOB	Address	Gender	Mobile	Patient Type	Title	ICPC2 Code
Kellie Test	01/01/2010	11 testland test town dublin	F		Private	ASTHMA	R96

You can export the report to XML, CSV, Tff, PDF, Web or excel. The report can also be printed in the format that it appears in.

Creating New Reports – Report Builder 3

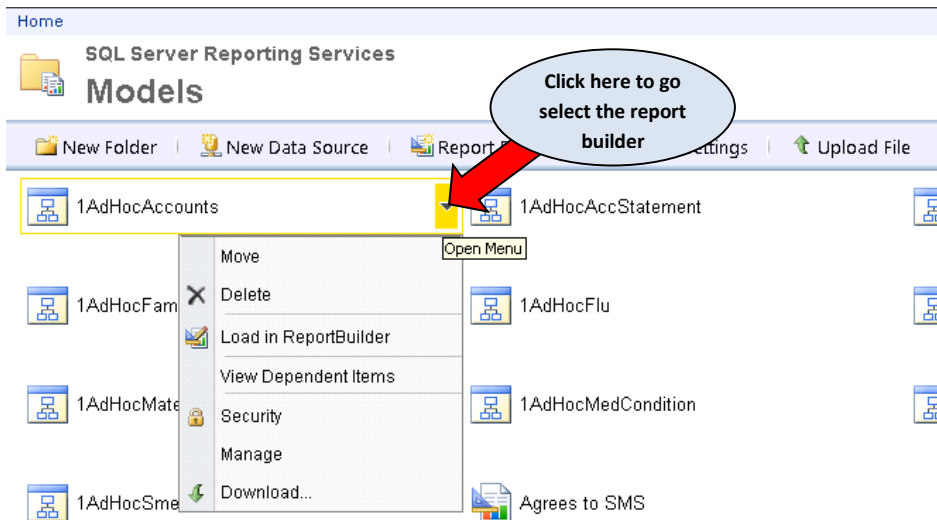
In order to create your own reports you will need to launch the report builder. To access the report builder click on the link in the Reports menu for Custom Ad-Hoc Reports, then navigate to 'Models' folder.

Step 1 - Selecting the Module

The user must firstly choose the data source that they wish to use. The data sources available correspond to the different areas of the system that can be reported on. As more default reports are created and more customer requests are received this area will grow. At the moment, reporting can be done in the following areas:

- ➔ Accounts
- ➔ Attendance
- ➔ Consultations
- ➔ Family Planning
- ➔ Flu Vaccine
- ➔ HeartWatch
- ➔ Immunisations
- ➔ Maternity
- ➔ Medical Conditions
- ➔ Medications
- ➔ Patients
- ➔ Recalls
- ➔ Cervical Smears
- ➔ Group Schema – This section allows you to pull information from a combination of the above modules.

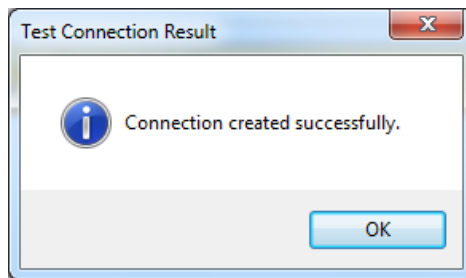
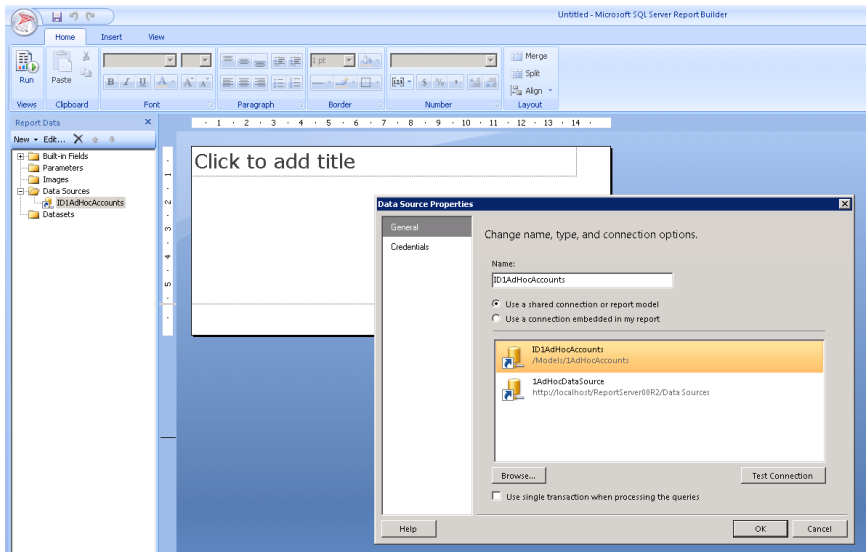
From the 'Models' folder place the cursor over the model you wish to use as a data source for you report. Click on the down arrow which appears to the right and from the list select 'Load in Report Builder'.



Step 2 – Configuring your data source in Report Builder

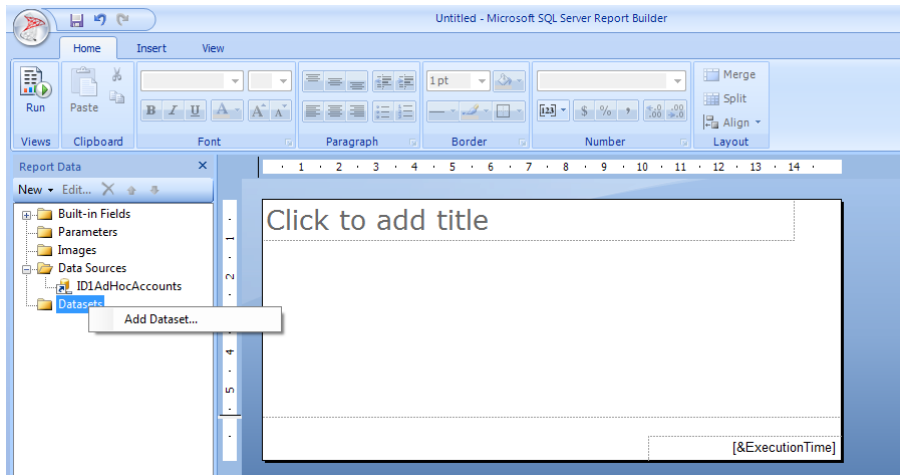
Once Report Builder has started then expand the 'Data Sources' folder by clicking on the plus sign to the left, then Right-click on the data source e.g. "Adhocaccounts" and select 'Data Source Properties'.

The Data Source Properties box will appear and from this select the data source you wish to use and click on the 'Test Connection' button to make sure you can see the database. Once you get a successful connection click on the 'OK' button.

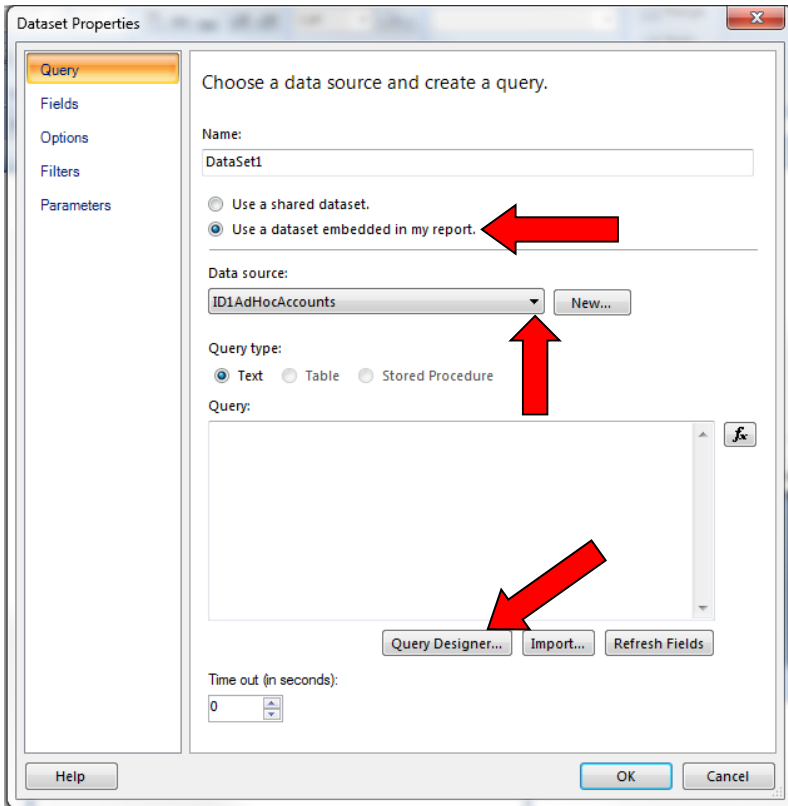


Step 3 - Creating a Data Set

From the Report Data tree, right click on Datasets and select 'Add Dataset'.



On this screen from the Dataset properties form select 'Use a dataset embedded in my report'. Then select the data source from the drop down (it should be the one just created from the model) and click on the 'Query Designer...' button to create your query.



Step 4 – Adding Content

The user can now begin creating their custom report.

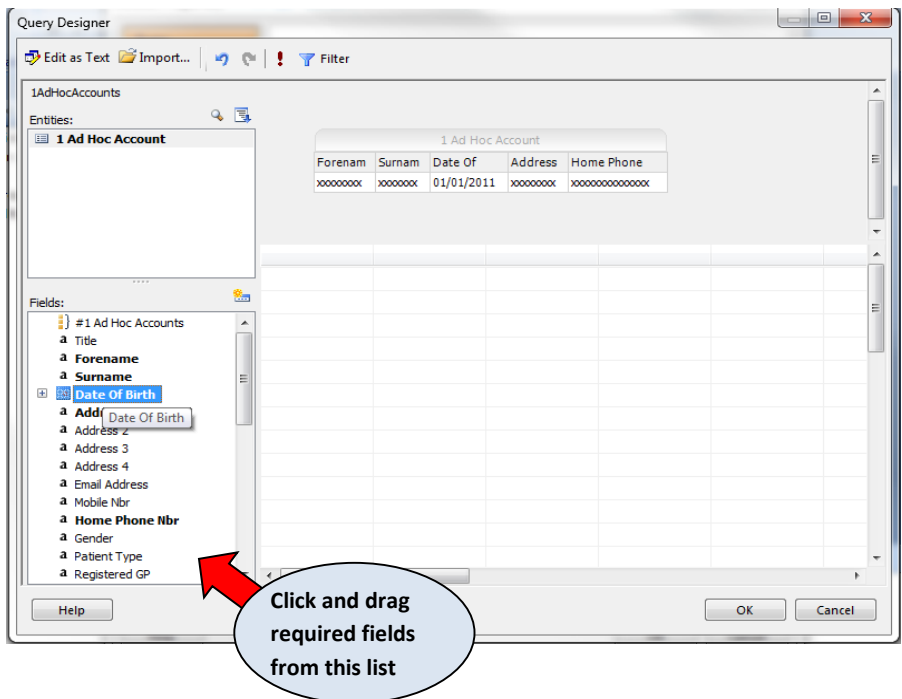
Adding fields to display on report

The user can drag any fields from the left hand side and drop them into the top box on the right hand


side on the main form. When dragging and dropping in fields, drag the cursor onto the report and drop when you see the blue line appear beside the column name where you want to put it.

You can also double-click on a field to put it on the report.

The list of fields available will depend on the module you selected in step one.

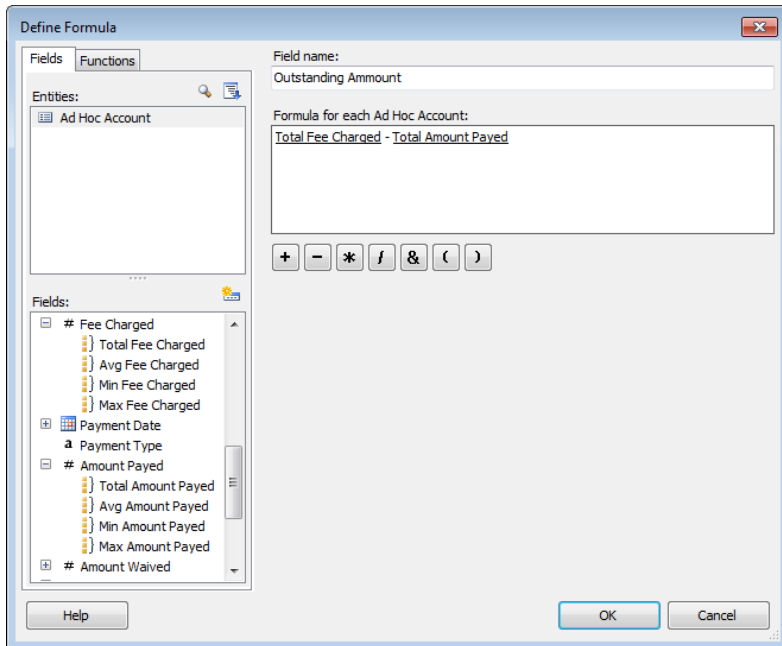


Creating New Fields

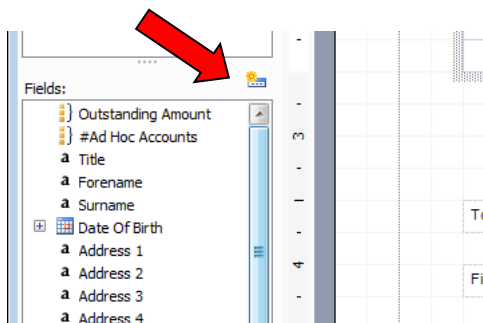
You can also create fields using the 'New Field' option.  You can find this option at the top of the list of available fields.

New fields can be created using one or more of the existing available fields.

For example when doing accounts reports, there is a field for amount charged and one for amount paid, if you were looking for the total amount outstanding on a bill, you could find this by taking one amount away from the other.

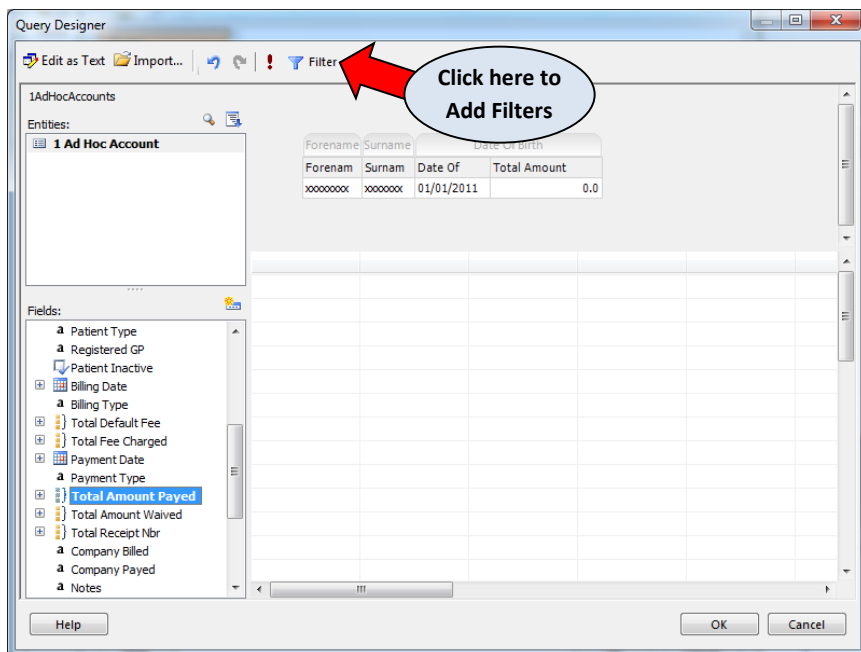


In this example shown above, select the total Fee charged, then click on the Minus symbol then select the Total Amount Paid. Name the field Outstanding Amount. When you click OK, this new field will appear at the top of the list of existing fields.



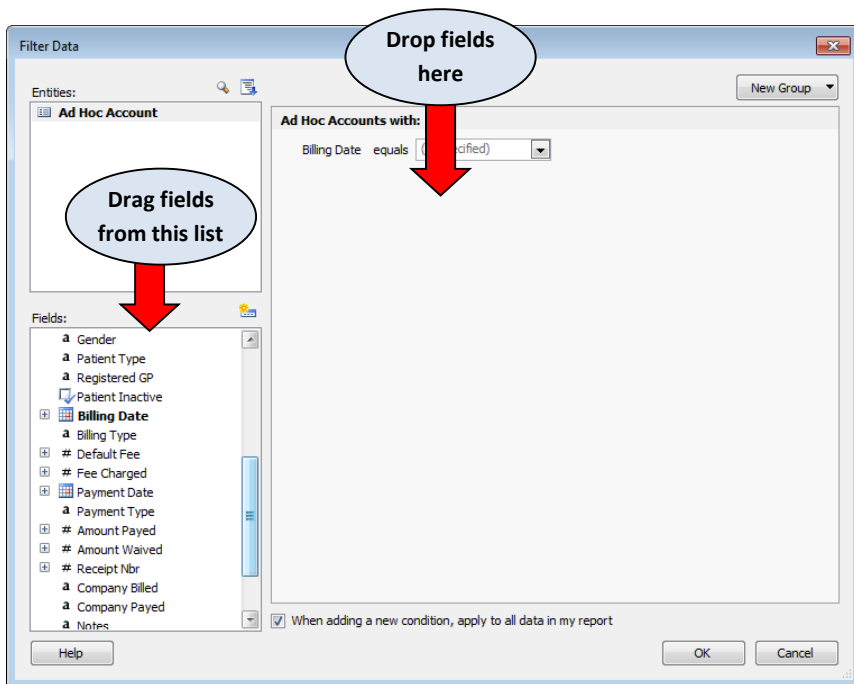
Adding Filters

The filter option can be used to add fields to filter the data, to specifically target the data you require.

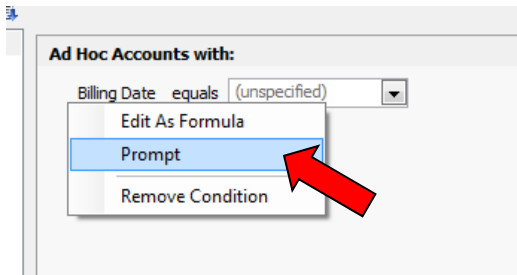


Filters are used to narrow down your reports by making different selections. Commonly used filters include dates, types (billing types, appointment types, medical conditions, etc) and figures (outstanding Fees, number of appointments, etc)

To add a filter, first select the field you want to use in your filter by double clicking on it or clicking and dragging it onto the main section.



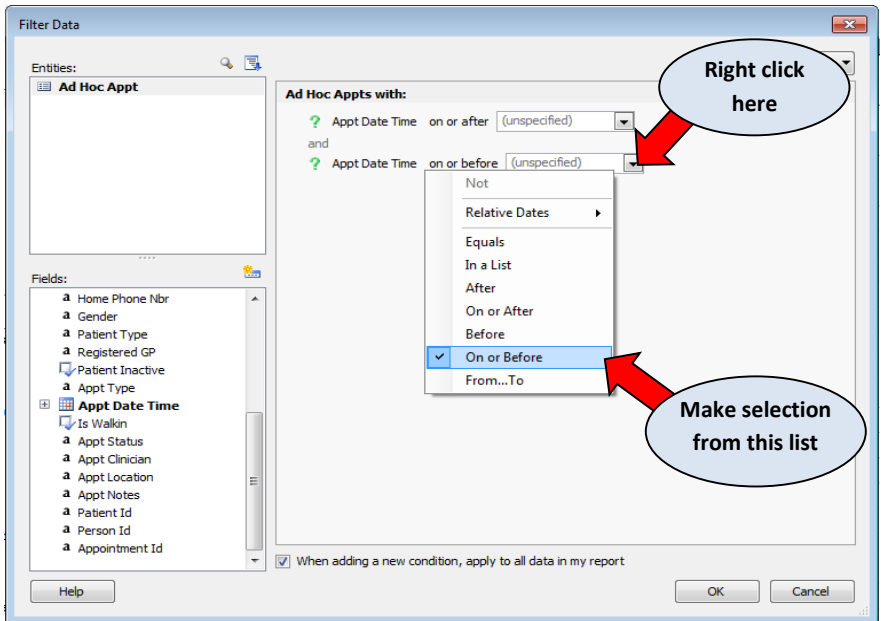
To make the field a prompt that will appear before the report runs, right click on the name of the field and select Prompt.



Right click on Equals to change the filter criteria further; there will be any number of the following options:

Condition	Explanation	Example
Not	Chosen field is NOT EQUAL to a specified value.	Where Billing Type NOT EQUALS Consultation
Relative Dates	Chosen field is in: This Month, Quarter or Year Month to date, Quarter to date or year to date Last (n) (where n is a number of days, months, quarters or years). Next(n) (where n is a number of days, months, quarters or years). Same month last year Same quarter last year	Where Payment Time/Date IN SAME QUARTER LAST YEAR
Is Empty	Chosen field is empty or	Where patient

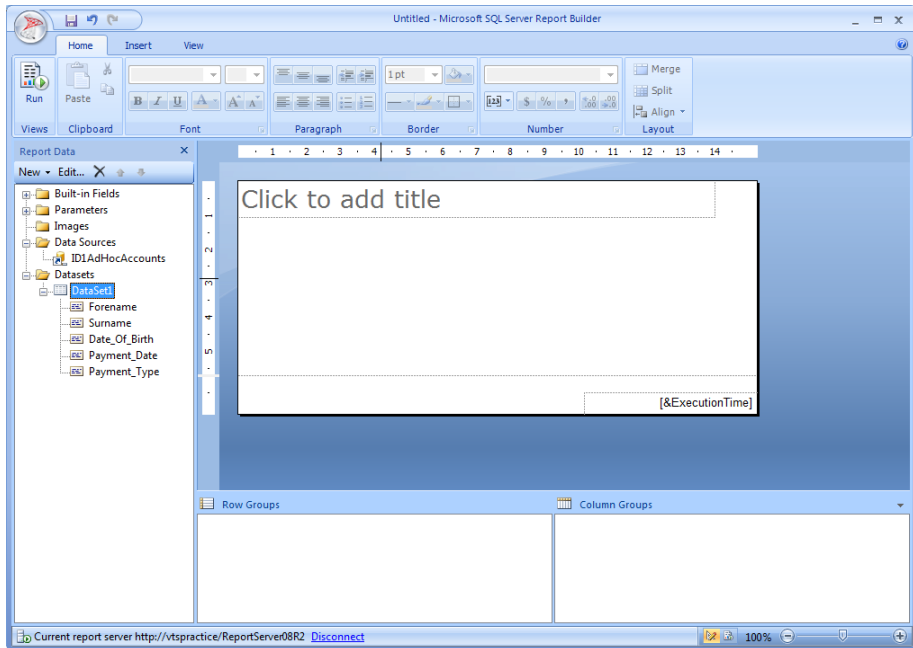
	contains no value.	PPSN IS EMPTY
Equals	Chosen field is equals to a specified value	
In a list	Chosen field is a list of values and the user can select one or more of these.	
After	Chosen field is after a specified value.	
On or After	Chosen field is on or after a specified value.	
Before	Chosen field is before a specified value.	
Contains	Chosen field contains the specified value or text in any part of the value.	Medical Condition Contains "Asthma" This will find all medical conditions containing the word asthma.



Step 5 – Designing the Report in Report Builder

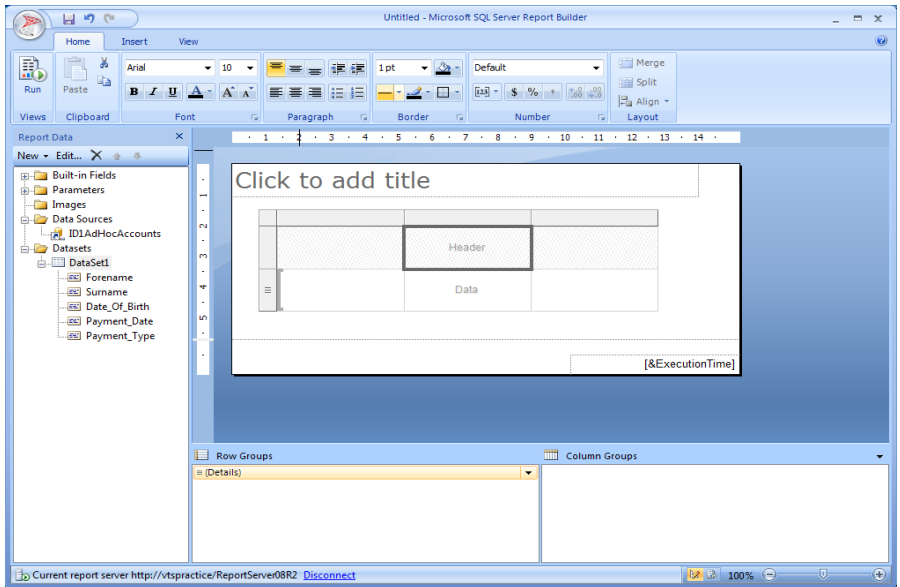
Now that you have your Data Source and Data Set you can set about designing the layout of your report.

You should now see the fields you have selected on the right hand side of the screen.

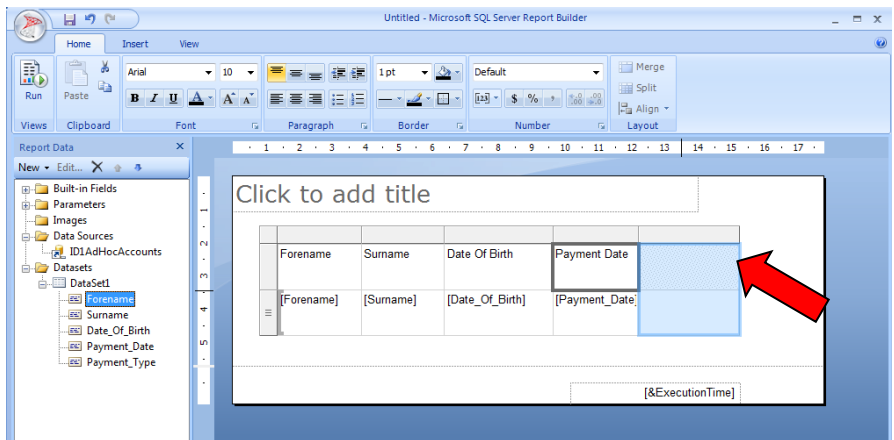


Returning the results in a table

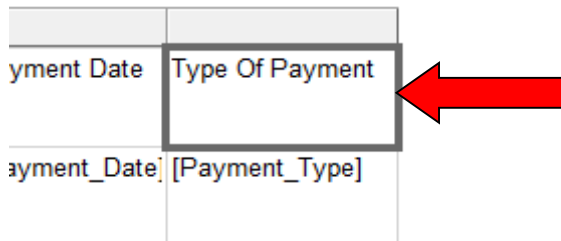
Click on the insert tab and click on Table and click on Insert Table, then move the mouse to the main report screen and click once this will put a table on to the page, you can adjust the height and length of the table by dragging out the column widths.



Then click on the data set fields on the right hand side and drag into the required column.



They user can edit the top row to if the heading is not correct



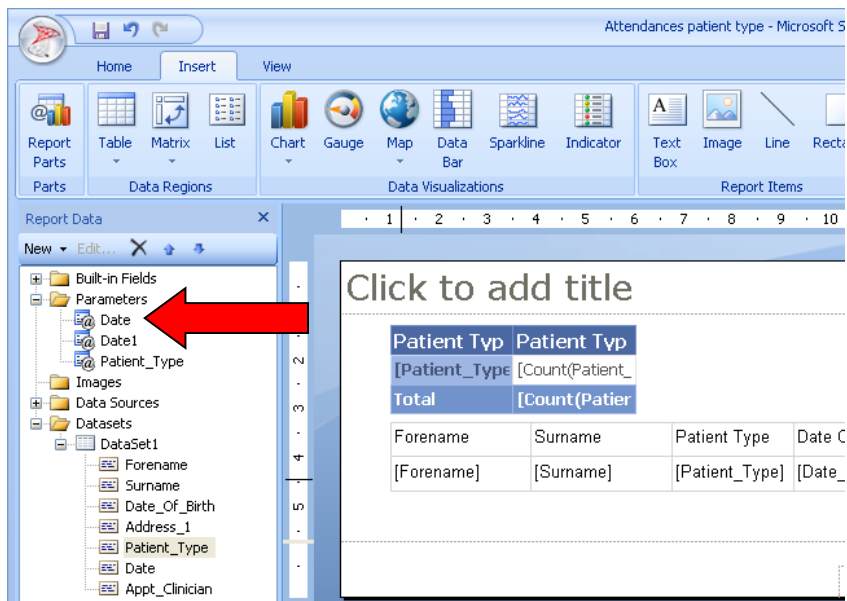
A title can be added to the main report also by click on "Click to Add title"

Forename	Surname	Date Of Birth	Payment Date	Type Of Payment
[Forename]	[Surname]	[Date_Of_Birth]	[Payment_Date]	[Payment_Type]

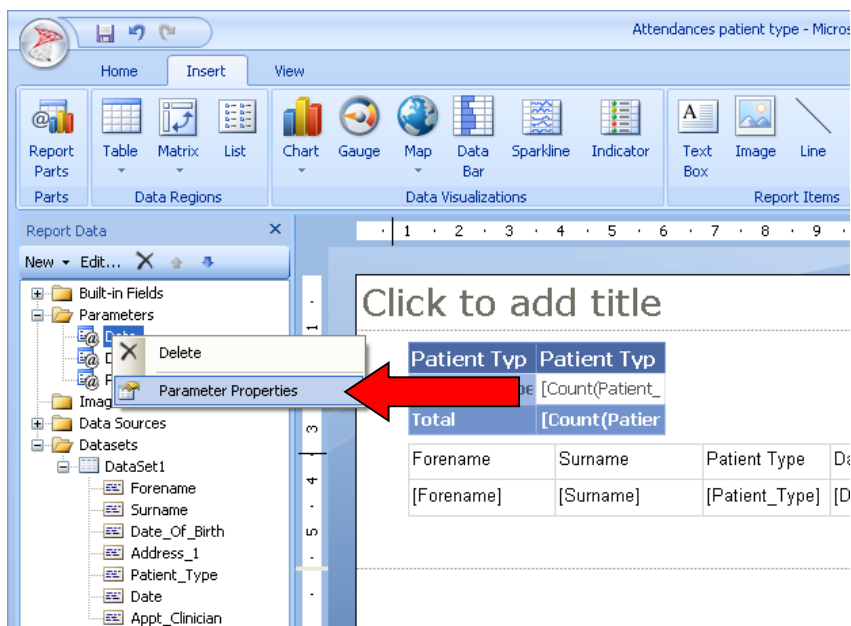
Date Parameters

If you are using date fields in your report as a filter, you can make sure the correct format is being used in the report.

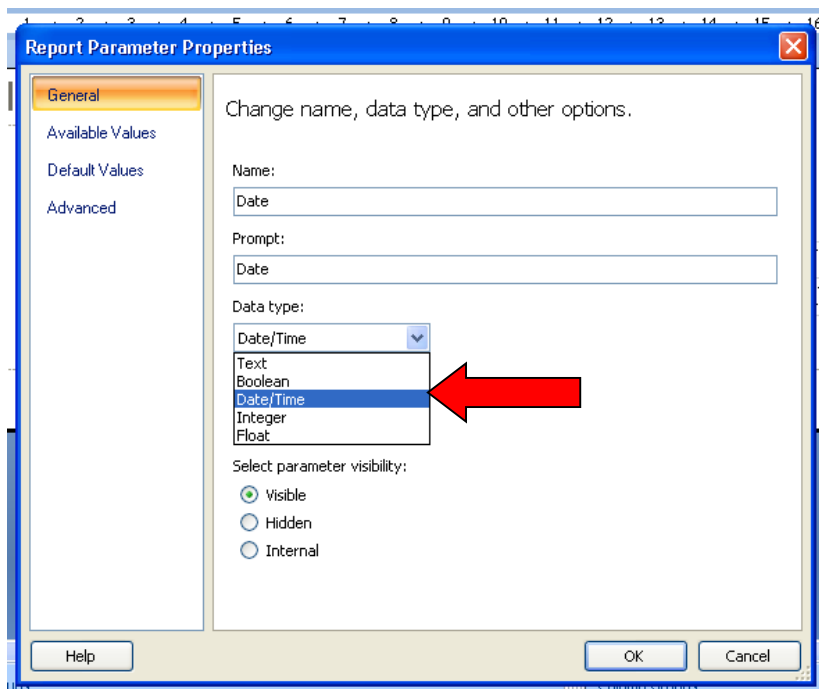
Select the Parameters folder on the left of the screen:



Then select the Date field, right click on this field and select Parameter properties:



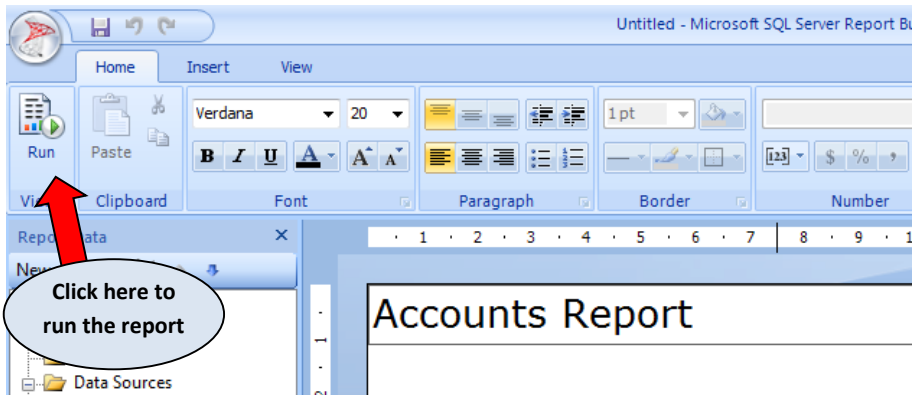
Click on the Data Type drop down and select Date/Time.
Click OK to save, and repeat for any other date fields in
the parameters section.



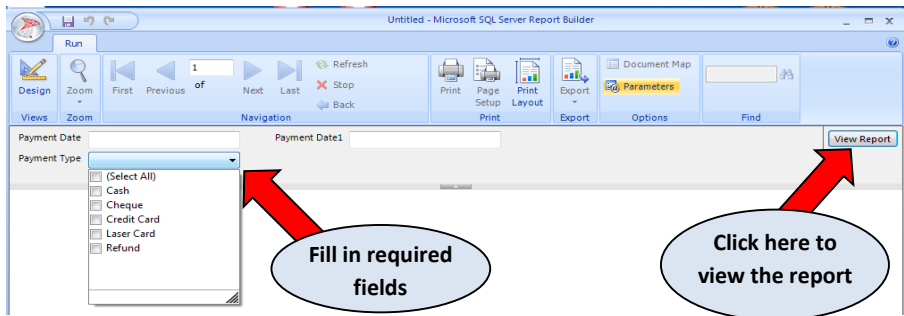
Step 6 – Viewing the Report

Once you are happy with the report layout you have created you can run it to check the output is as you require.

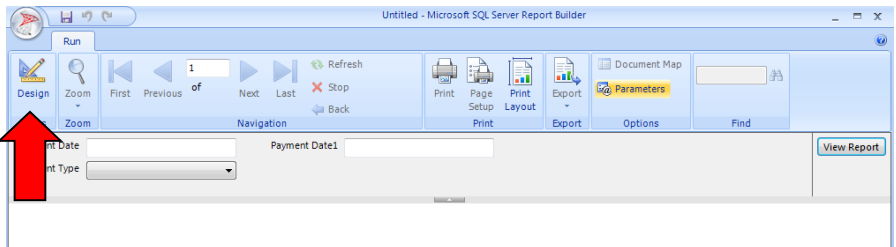
At the top of the screen on the home tab click on Run.



If you had added any prompts at the filter stage, these will appear at the top of the screen. Run the report to make sure it is correct

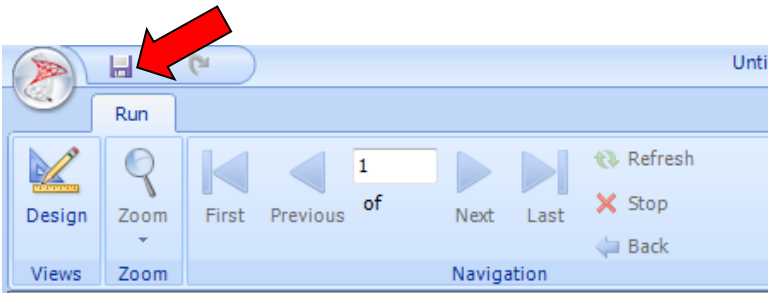


If you are not happy with the report at this stage, you can return to the report builder and make any required changes by clicking on Design at the top of the screen.

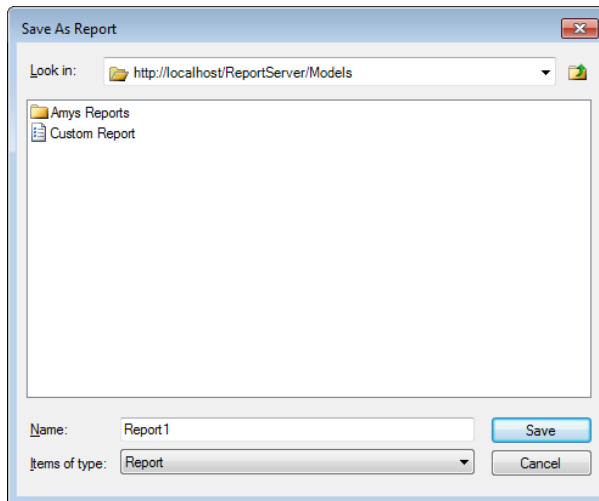


Step 7 – Saving the Report

Once you are happy with the report you need to ensure that you save it. Click on the save icon on the top left hand side of the screen in either the design or run mode.



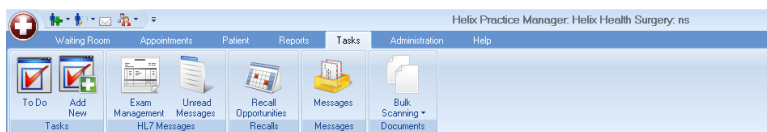
This will open up a 'save as' dialog box. Type in the Name of the report and select a relevant folder to save the report in. This report will then appear in the folder you have saved it for you to run as you require in the future.



Saved reports can be accessed when you open the Custom Adhoc reports icon from the Reports menu in HPM.

Tasks

The tasks tab enables the user to handle a number of practice functions.



Tasks

The Tasks window enables the user to set up and maintain a task To Do List for the different members of the practice. Tasks can be set from the task tab or when finalizing a consultation for a patient. They can be linked to patients or can be general practice tasks.

Practice tasks can also so assigned here.

To add a new task click on Add New and enter in the task details as follows –

Field	Details
Related to	A patients name can be assigned here or the other tab can be used to enter in an unregistered patient.
Assigned to	This will be a drop down list with all the users of the system
Role	You can assign a task to a particular role or group of people i.e. Nurse, Doctor, Admin etc.
Select All Users	This will select all users for this task
Referral Type	This is used for practices that have a primary care team assigned to them

Details	Enter in all the information about the task
Due	This date is when the task is due for completion
Is Urgent	If this is ticked, it marks the task as urgent in the list. This will now display on the users list in red.
Display as pop up	This will show the task as a pop up at the bottom of the recipients screen
Close tasks for all users	This closes the task for all users
Repeats	Allows you to set a repeat task
Reminder Type	This drop down has three options – On System Exit, Next Opening of Patients Chart, and Start Application. If you choose one of these options you will need to give a date
Reminder Date	The date of when the reminder is needed should be entered in this box
Status	The task will default to open when created but when the task has been completed it can be closed.

Task

Created on: **22/05/2013 16:15** By: **PM -> (9 Open) - (9 New) -> (8 Open) - (8 New)**

☒ Patients ☐ Other

Related To:

Role:

Assigned To:

- ☒ PM -> (9 Open) - (9 New) -> (8 Open) - (8 New)
- ☐ David Carroll -> (0 Open) - (0 New) -> (0 Open) - (0 New)
- ☐ Dr Walter Kelly -> (0 Open) - (0 New) -> (0 Open) - (0 New)
- ☐ Fiona Smith -> (0 Open) - (0 New) -> (0 Open) - (0 New)
- ☐ Dr Jane Nolan -> (0 Open) - (0 New) -> (0 Open) - (0 New)

Select All Users: ☐

Referral Type:

Details:

Due: 22/05/2013 At: 16:15

Is Urgent: ☐

Display As Pop-up: ☐

Close Task for all users: ☐

Reminder Type:

Status: ☐ Closed ☒ Opened

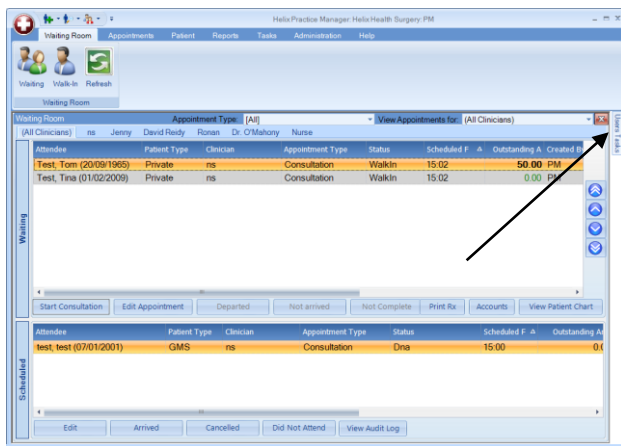
Repeat

☐ Once on:

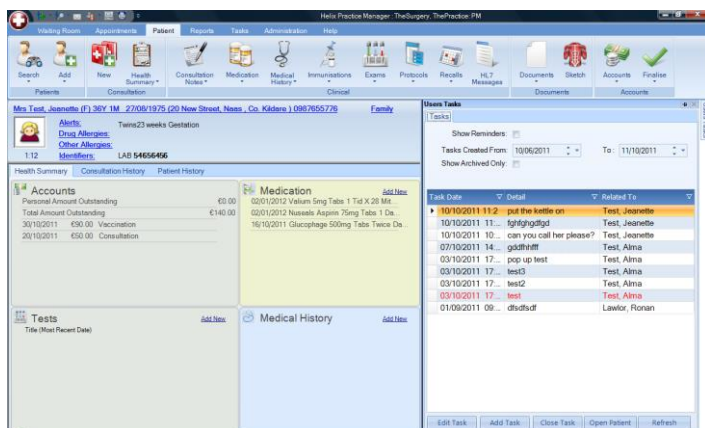
☐ Every: Until:

☒ OK ☐ Cancel

Users Tasks are docked on the right hand side of Helix Practice Manager so a user can check their tasks list at any time in any part of the system. Click on the user tasks tab to view your task list and then to hide the list click anyway else on the system.



From this screen you can filter tasks by date range, reply, close task or go to the patients medication screen.



Tasks for Patients


A new icon has been added to the patient chart. If a patient has a task against them, the icon will appear on

the top right of the summary screen. When selected, open a list of tasks for this patient only.



As you can see in the screenshot below, the tasks for patient 'Dave Test' have opened. All tasks for that patient are shown regardless of who the task to assigned to.

Mr Test, John Jnr (M) 17Y 9M 11/02/1996 0860378921 (med centre, market st, skibbereen, add 4)

 Alerts:
[Drug Allergies:](#)
[Other Allergies:](#)
0:19 [Identifiers:](#)

Tasks

☐ Tasks Created From: 22/11/2012 To: 22/05/2014 ☒ Due From: 22/11/2012 To: 22/05/2014

☐ Include Reminders: ☐ Show Archived Only: ☐ Include Repeats: ☐

Received Tasks Sent Tasks

Related To	Created By	Created Date	Owner	Detail
Test, John Jnr	PM .	21/11/2013 16:14	PM . -> (0 Open) - (0 New), P	test 2

A Task Type column has been added to the tasks view so users can see which items are tasks, which are reminders and which ones are recurring tasks.

There are three types of tasks:

Task – This denotes a regular task with no recurrence

*Task - This denotes a recurring task (using the Repeat section when adding a task)

*Reminder - This denotes a reminder (Using the Reminder Type option)

HL7 Messages

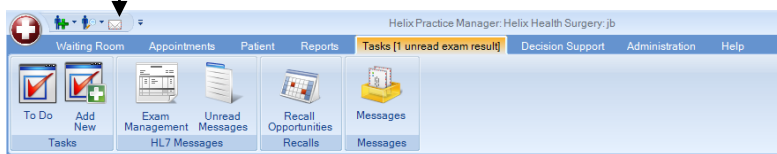
Exam management and unread messages will be covered in the chapter on Examinations.

Recalls

Recall Opportunities will be covered in the chapter on Vaccines.

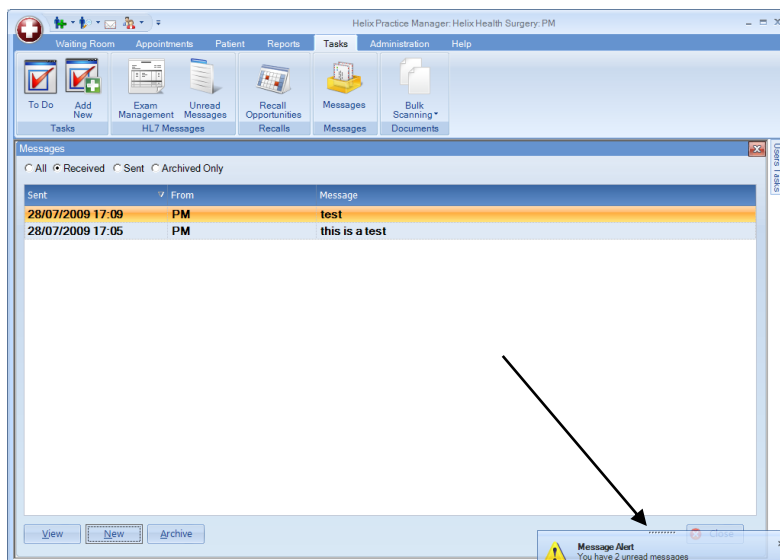
Messages

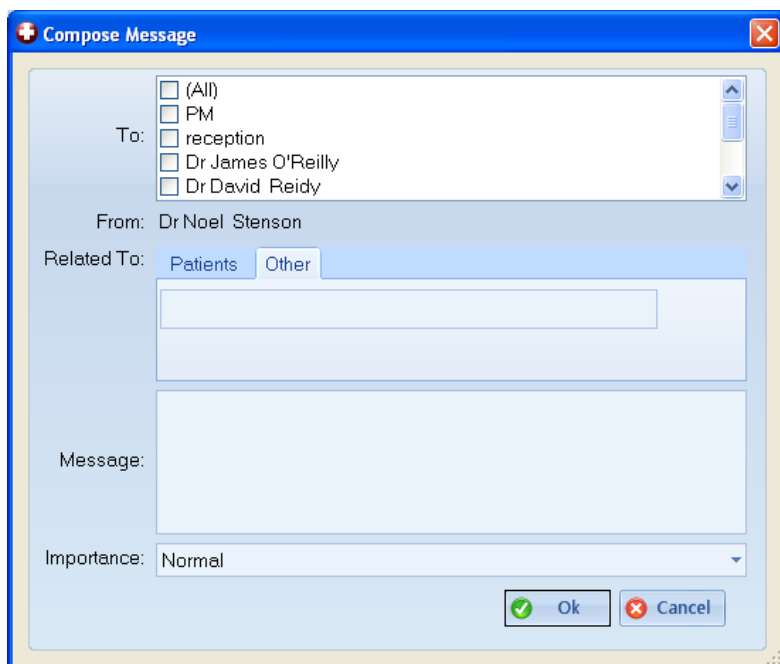
There is an internal messaging system with HPM that allows users to send messages to each other. To view or send a message click into Messages on the task menu, this will display all your messages. If there are any in bold writing then these are unread messages. A white envelope icon will also appear at the top of the screen to show you that you have a new message waiting for you.



To view your message either double click on the message itself or highlight and click on view. This shows who the message was sent to and from and the details of the message.

In addition to the white envelop a pop up alert box will appear in the bottom right hand corner of the screen and then fade out so you can either access the message immediately by clicking on it (before it fades out) or access the message as above.





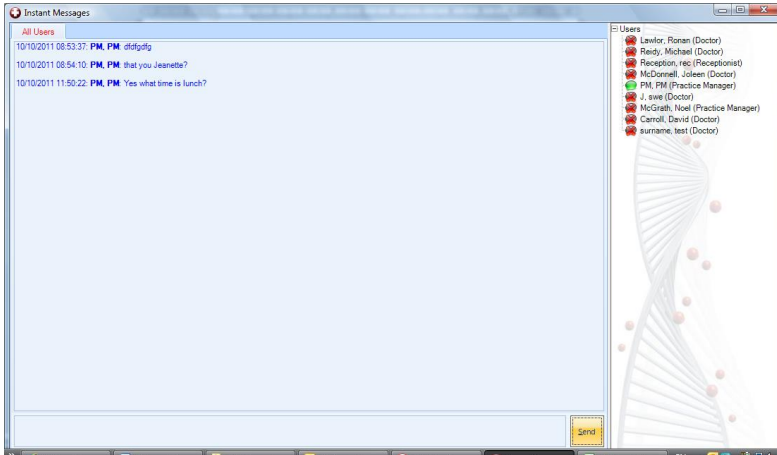
The screenshot shows a 'Compose Message' window with a blue title bar. Inside, there is a list of recipients with checkboxes: (All), PM, reception, Dr James O'Reilly, and Dr David Reidy. The 'From' field is set to 'Dr Noel Stenson'. Below this, there are two tabs: 'Patients' (selected) and 'Other'. A text input field is present under the 'Patients' tab. The 'Message' field is a large text area. The 'Importance' dropdown is set to 'Normal'. At the bottom right, there are 'Ok' and 'Cancel' buttons with green and red icons respectively.

When you are finished with a task it can be archived.

Instant Messaging

There is also a facility for instant messaging/virtual chat between users in the practice logged into your HPM system.

To access instant messaging click on Messages and then Instant Message, the following screen will appear.



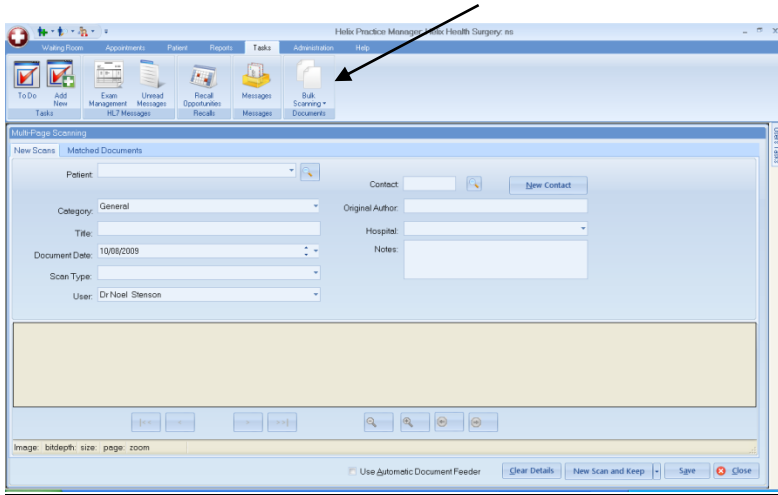
The people who are logged on will display in green. To send a message simply type in the box at the bottom and click send. When a message is received it will flash orange at the bottom of your screen.

Please note that IM is cleared down at 12pm every night.
There is no way of saving IM chat

Bulk Scanning

For a more efficient and time saving way of completing a lot of scanning, the best way is to use the Bulk Scanning module.

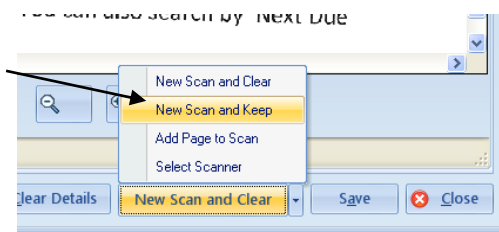
Open the Tasks menu and click on Bulk Scanning.



If you are using the document feeder on the top of your scanner, tick the box beside 'Use Automatic Document Feeder'.

To scan a number of documents:

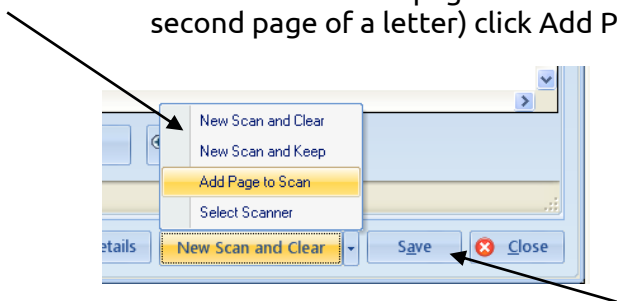
1. At the bottom of the screen, choose from the drop down to do New Scan and Keep. The document will scan in.



2. Fill in the following options on screen:

Field	Details
Patient	Type the patient's name here or Date of Birth and click the search icon to find the correct patient.
Category	This will be a drop down list with a list of categories for the scan. You can add to this list from administration.
Title	Fill in a title for the scan
Document Date	You can record the date the document was written here.
Scan Type	This can be used to further categorise your scans
User	This will default to the user logged in, but can be changed if needed using the drop down list
Contact	You can associate a contact from your list of contacts to the scan. E.g. consultants or doctors
Original Author	The author of the document can be recorded here
Hospital	You can record the hospital or organisation where the document originated from.
Notes	You can add your own general notes here.

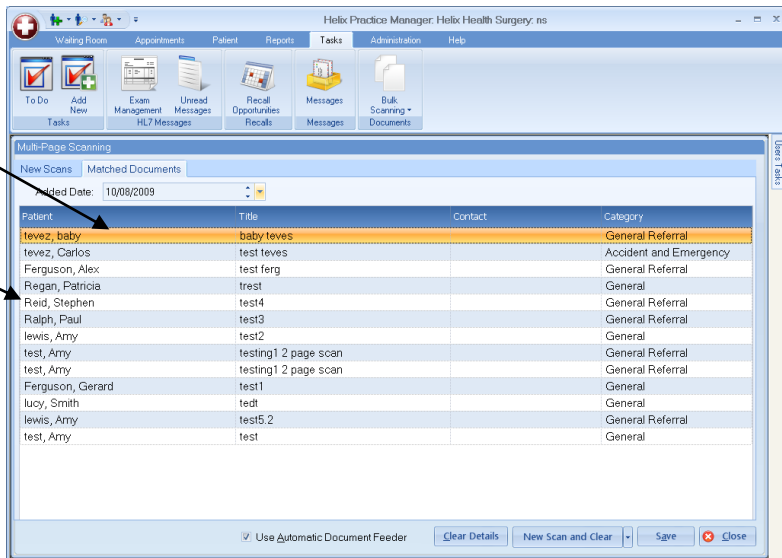
3. If there is another page to add to this scan(e.g. a second page of a letter) click Add Page to Scan



4. Click Save to save the document to the patients file.

5. For the next scan, choose New Scan and Clear to clear all the details on screen and do a new scan, or if there is another scan for the same patient choose New Scan and Keep.

At the top of the scanning screen there is a tab called Matched Documents. You can use this list to review your scans that are saved on any given day.



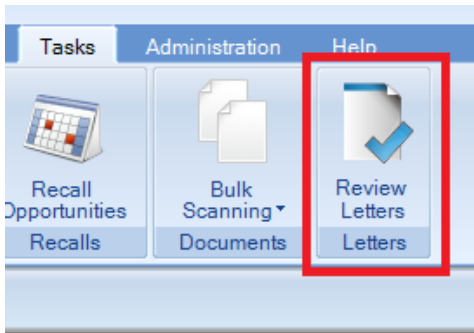
High Volume Scanning

In 'High Volume Scanning' you can now scan in multiple documents for multiple patients in one go through the document feeder. By placing a number of documents in the Feeder, and clicking on New Scan, all the pages will be

scanned and saved as individual scans and can be assigned to a patient one at a time afterwards.

Review Letters

In Tasks, there is a new option called 'Review Letters'.



When adding a letter, you can select another Clinical user to review the letter. This feature is useful for secretaries / administration staff who write letters but need another clinical user to review / sign off on the letter.

Clinical users can open the letters from this review letters section. Clinical users can see which letters they need to review and can mark them as reviewed. There are two tabs: 'For Review' and 'Reviewed'. There is a filter for which user is to review the letter and also a filter for dates based on when the letters were created.

For Review By: (All)		Letters Created From: 24/03/2013		To: 25/07/2013	
<div>For Review</div> <div>Reviewed</div>					
Created Date	Related Patient	Title	Reviewed By	Review Date	Created By
24/07/2013	Shane Test	Referral Letter Long	Dr Patricia Test	24/07/2013	PM pm

On the Patient's Health Summary, there is now a review date and a created date in the document panel.

Test, Shane (M) 31Y 0M 25/06/1982 (Citywest, Dublin 24)

 [Alerts:](#)
[Drug Allergies:](#)
[Other Allergies:](#)
0:45 [Identifiers:](#)

Health Summary Consultation History Patient History

 **Documents** [Add Letter](#)

Document Title	Reviewed	Created
Referral Letter Long David Test		24/07/2013

Scans can also be marked for Review. When the user scans in a document in a patients chart, there is an extra field to indicate who you want to review the scan

Scan Item

Details

Category: General

Title: test scan

☒ Incoming

Notes:

Document Date: 20/11/2013

User: PM

Original Author:

Scan Type:

Hospital:

For Review By:

Organisation:

Scan Switch Scanner Use Automatic Document Feeder Ok Cancel

When you scan from High Volume/bulk scanning there is also a field there to mark who you wish the scan to be reviewed by.

Theses scans can be viewed in the same way as described above for letters, by going into tasks, and clicking on the review section. Here the user can select what letters they wish to view and mark as reviewed.

SMS Messaging

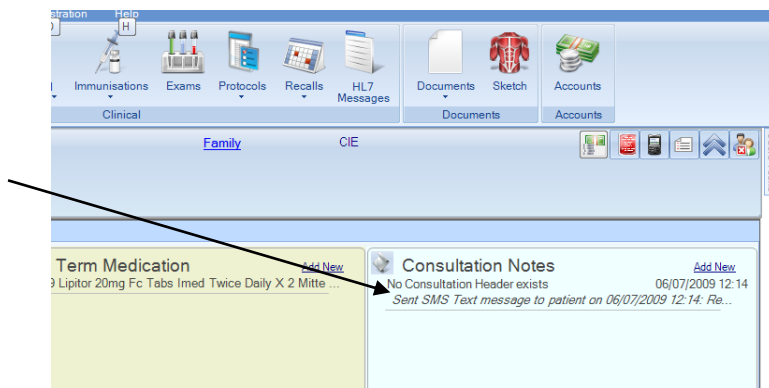
HPM allows the user to send individual or group text messages from the appointments, Health Summary, Recalls and exams section of the application.

Text Message templates can be created in the administration section of the application.

In order to send Text Messages, you must set up an account with Clickatell. Please contact our customer support line if you need assistance in doing this. Text credits can be bought from this company.

For a text message to be sent successfully to a patient, the patient must have a valid mobile phone number (note that mobile numbers that have dashes or spaces will still be considered valid numbers) and that the patient has ticked the 'Consent to SMS' option in the patient's demographics.

A record of the text message sent to that patient is entered into the consultation notes.



When sending SMS (text) to a group of patients, a failed SMS list window will appear with a list of names of patients that didn't receive the SMS, e.g. not consented, no mobile phone number in their chart or invalid phone

Failed Sms List

Result: **Message sent only to 2 recipient(s) out of the 6 selected recipient(s).**

Failed to send message to 3 recipient(s) as they did not consent to SMS notifications.

Failed to send message to 1 recipient(s) as they do not have a mobile number.

Not Consented

- ☐ Lady Breda Delaney on 0871111111
- ☐ Laura Browne on
- ☐ Ms Bridget Townsend on

No Mobile Number:

- ☐ Amy Lewis on

Invalid Mobile Number:

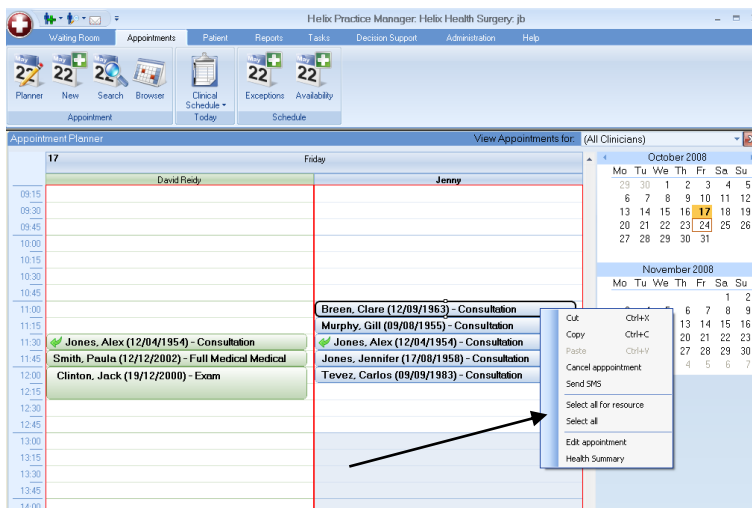
Other:

number.

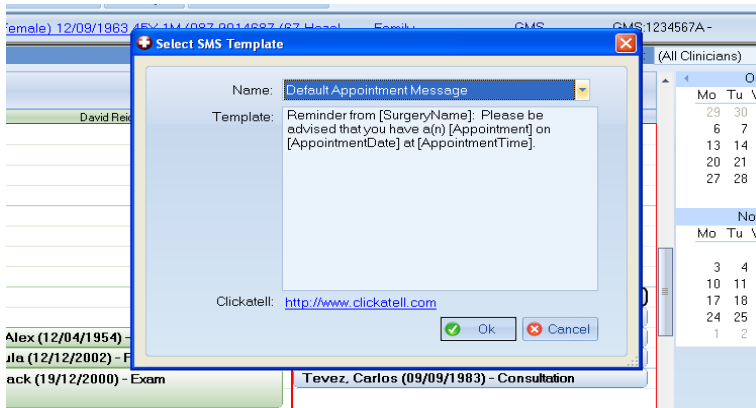
Appointments:

To send an SMS message to a patient that has an appointment open the planner in the appointments module. Left click on an appointment to highlight and then right click on it you will see an option called 'Send SMS'. This allows you to send a message to this individual patient by selecting a template.

To send multiple SMS messages at the same time, you can right click anywhere (not on an appointment) in the planner and you will see an option to 'Select All' and 'Select All for Resource'. 'Select All' will select all patients for this date. 'Select All for Resource' will select all patients for the user's column that you are in for the selected date.



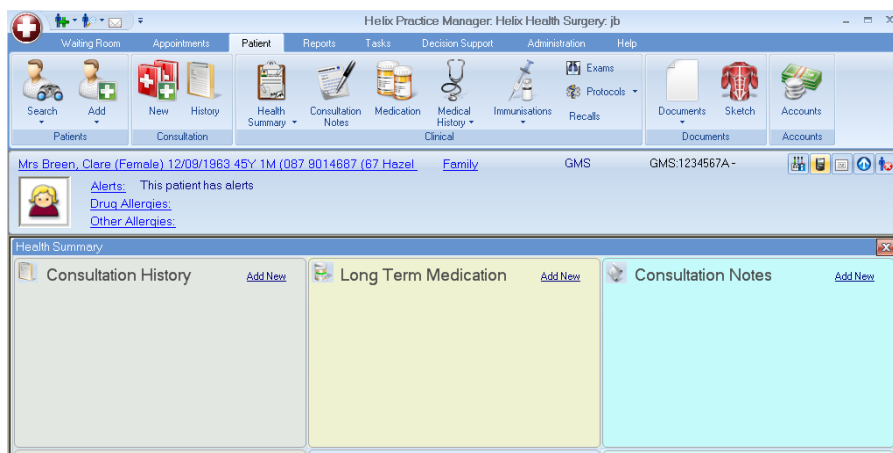
Once you click on 'Send SMS' you will be given the option to select a template that you wish to send. Once you click OK, the system will attempt to send the text messages to the selected patients.



Patients Health Summary

In the patients' health summary you will see an icon that allows you to send a text message to this patient.





Recalls

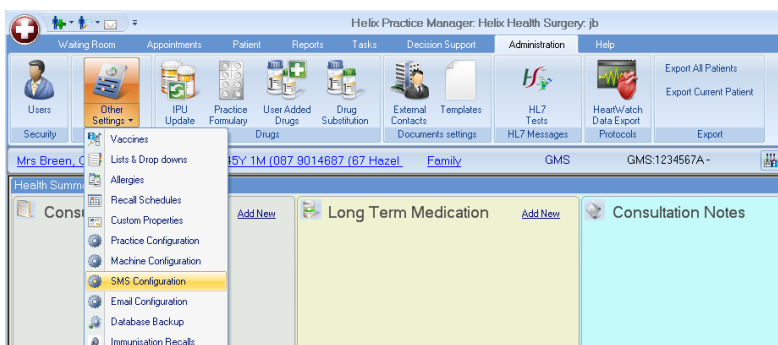
When a recall schedule is set up (See chapter on Immunisations and recalls) there is an option to see that group of people a SMS Message.

Exams

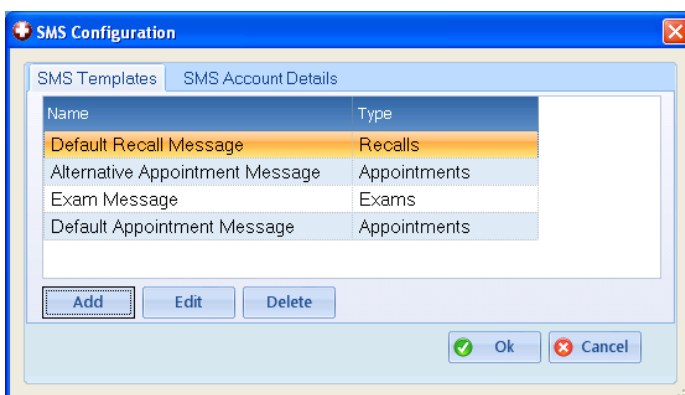
When the exam results are downloaded an SMS Message can be sent to notify the patient. (See Chapter on Exams)

Creating new SMS Templates

To create a new template click on Administration and then Other Settings and then SMS configuration you will be brought to the SMS Configuration screen.



Here you will see a list of existing SMS Templates. You can edit these or create new ones as you require.



When creating a new template, the follow inserts can be used:

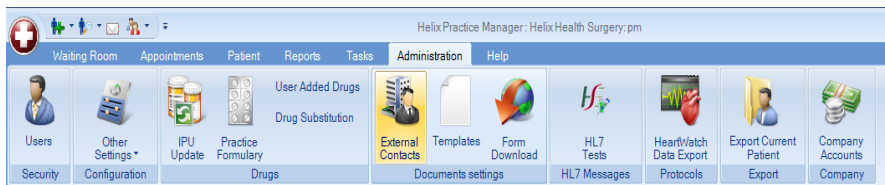
- [Recall]
- [Appointment]
- [AppointmentDate]
- [AppointmentTime]
- [SurgeryName]

- [SurgeryPhoneNumber]

When one these inserts are used, the relevant information will be imported.

Administration

The administration tab will allow the user to configure your system. The user can access the administration module by selecting the Administration tab. You must be logged in as the Practice Manager in order to be able to make certain changes.



Here you will see the following options

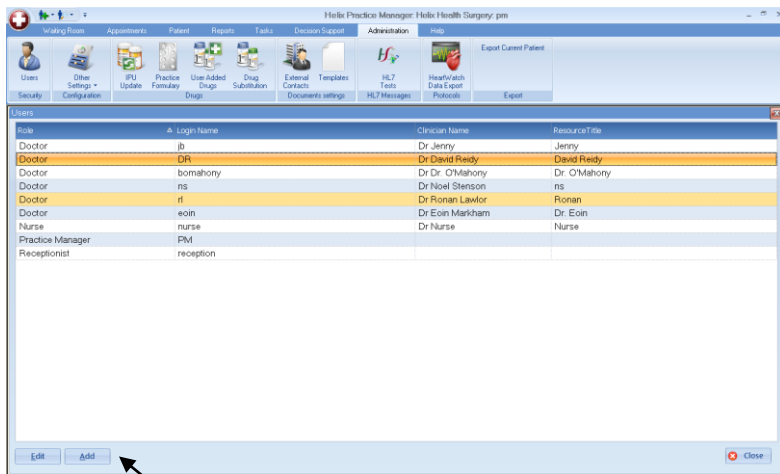
- Users
- Other Settings
- IPU Update

- Practice Formulary
- User Added Drugs
- Drug Substitution
- External Contacts
- Templates
- Form Download
- HL7 Tests
- Heart Watch Data Export
- Export Current Patient
- Company Accounts

Users




To open the User section you need to click on the Users icon.



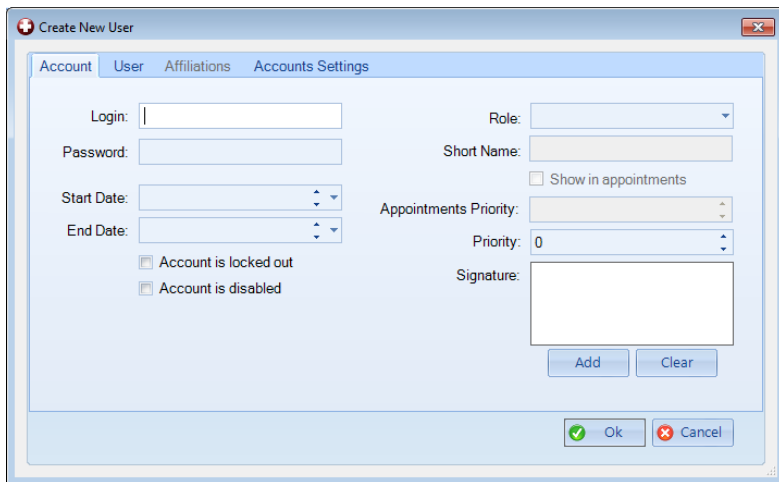
Add a new User

To add a new user to the system, click on the **Add** button.

Any field that has  beside it is a required field and needs to be filled in before you will be allowed to complete the task.

1. Account Tab

In the Account tab you will be asked to fill in the Login, Password, Start Date, End Date, Role and Short Name. You can also tick Show in Appointments if they are a clinician who will need to appear in appointments and the Waiting room.



The screenshot shows a 'Create New User' dialog box with the 'Account' tab selected. The dialog has a title bar with a red close button. Inside, there are four tabs: 'Account', 'User', 'Affiliations', and 'Accounts Settings'. The 'Account' tab contains the following fields and controls:

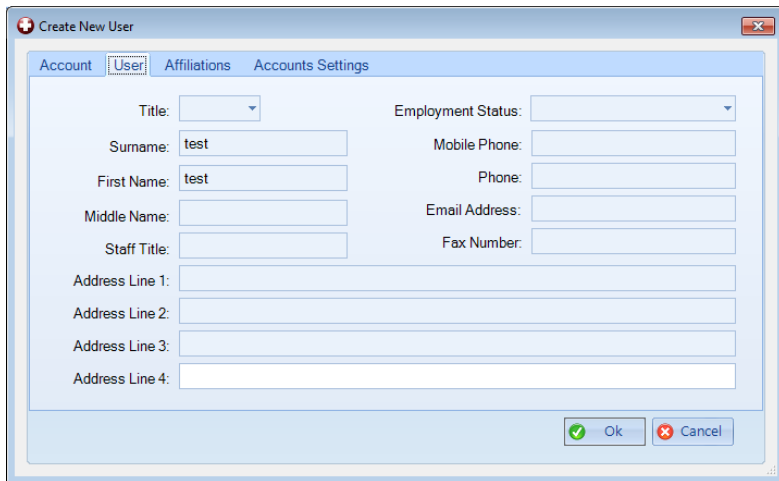
- Login:** A text input field with a red circle and exclamation mark icon to its right, indicating it is a required field.
- Password:** A text input field.
- Start Date:** A date picker control.
- End Date:** A date picker control.
- Role:** A dropdown menu.
- Short Name:** A text input field.
- Show in appointments:** A checkbox.
- Appointments Priority:** A dropdown menu.
- Priority:** A dropdown menu with the value '0' selected.
- Signature:** A large text area.
- Account is locked out:** A checkbox.
- Account is disabled:** A checkbox.

At the bottom right of the dialog are two buttons: 'Add' and 'Clear'. At the very bottom are 'Ok' and 'Cancel' buttons with green and red icons respectively.

There is also an appointments Priority level, and a Priority level which will prioritise the names where they appear in any lists of drop downs.

2. User Tab

In the User tab you must fill in the users First name and Surname. Other options here include title, staff title, address, employment status, email, phone and fax number.



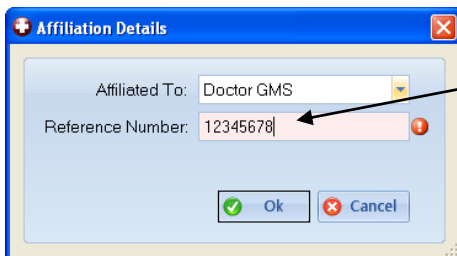
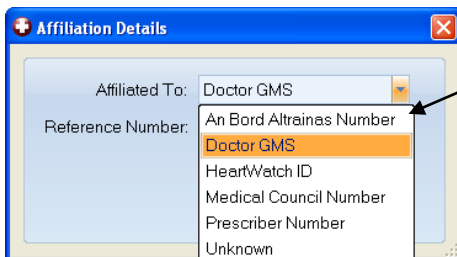
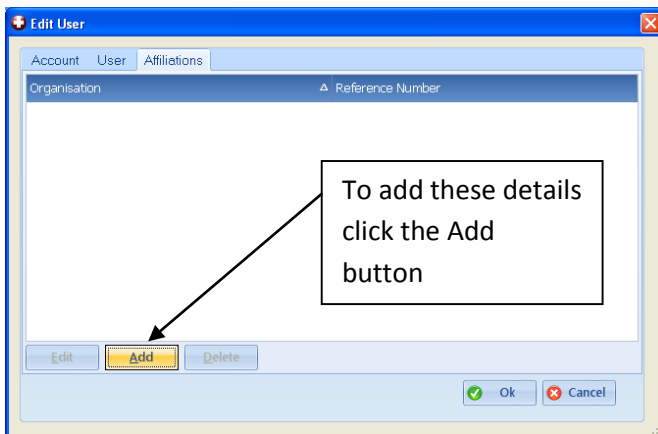
The screenshot shows a 'Create New User' dialog box with four tabs: 'Account', 'User', 'Affiliations', and 'Accounts Settings'. The 'User' tab is selected. The form contains the following fields:

- Title: [Dropdown menu]
- Employment Status: [Dropdown menu]
- Surname: [Text box containing 'test']
- Mobile Phone: [Text box]
- First Name: [Text box containing 'test']
- Phone: [Text box]
- Middle Name: [Text box]
- Email Address: [Text box]
- Staff Title: [Text box]
- Fax Number: [Text box]
- Address Line 1: [Text box]
- Address Line 2: [Text box]
- Address Line 3: [Text box]
- Address Line 4: [Text box]

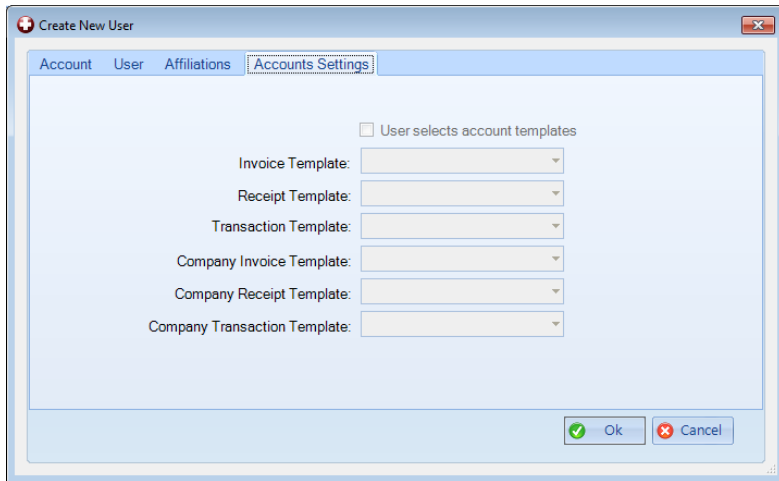
At the bottom right, there are 'Ok' and 'Cancel' buttons with green and red checkmarks respectively.

3. Affiliations Tab

In the Affiliations tab you can add from a choice of several different numbers such as the GMS number, heart watch ID or prescriber number from the drop down menu. You also need to add the associated number.



4. Accounts Settings



The screenshot shows a 'Create New User' dialog box with four tabs: 'Account', 'User', 'Affiliations', and 'Accounts Settings'. The 'Accounts Settings' tab is active. It contains a checkbox labeled 'User selects account templates'. Below this are six dropdown menus labeled: 'Invoice Template:', 'Receipt Template:', 'Transaction Template:', 'Company Invoice Template:', 'Company Receipt Template:', and 'Company Transaction Template:'. At the bottom right are 'Ok' and 'Cancel' buttons.

When you have filled in all the required details click OK and the user will be saved to the system.

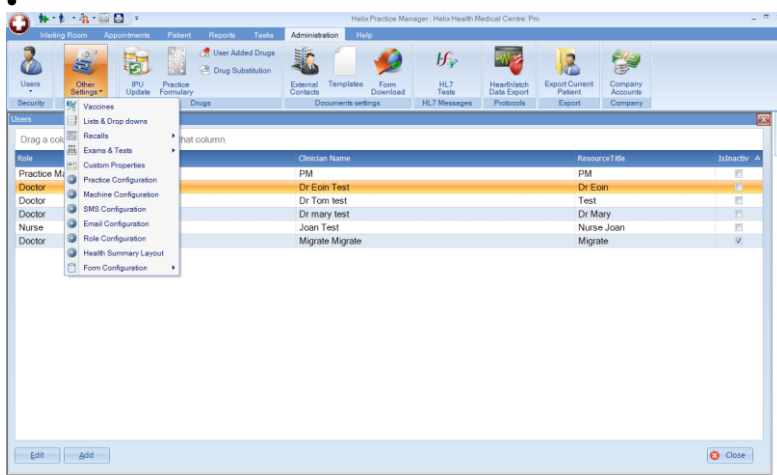
Other Settings



In Other settings you will be able to configure the following:

- **Vaccines** : Here you can add or edit a vaccine
- **Lists & Drop downs**: Edit the lists and drop downs
- **Recalls**: Add or edit the recall schedules
- **Exams and Tests**: Add or edit exams here
- **Custom Properties**: To Create your own registration fields
- **Practice Configuration**: Edit the practice information
- **Machine Configuration**: Edit the machine details

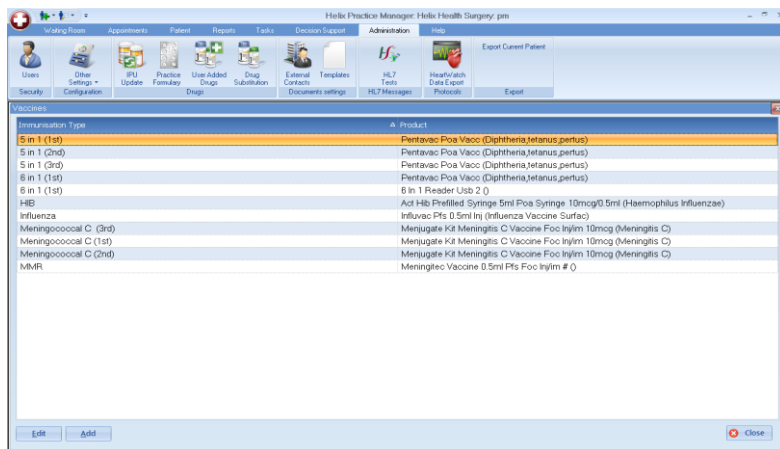
- **SMS Configuration:** Edit SMS templates and accounts
- **Email Configuration:** Edit email settings
- **Role Configuration:** You can decide what types of users can access certain areas of the system from here.
- **Health Summary Layout:** You edit the patient Health Summary screen layout.
- **Form Configuration:** This will be used to configure any form you download.



Vaccines

By selecting the vaccines option you will be shown a list of the current vaccines available in the practice. You will be

able to edit each of the current vaccines. You will also be able to add a new vaccine to the list.



Add a Vaccine

To add a new vaccine to the list click on the add button.



Drug: [dropdown]

Types: Immunisation Type [dropdown]

[Add] [Delete]

Default Site: [dropdown]

Default Method: [dropdown]

Notes: [text area]

Is Inactive: ☐

Batches:

Expiry Date	Batch Number	Active
-------------	--------------	--------

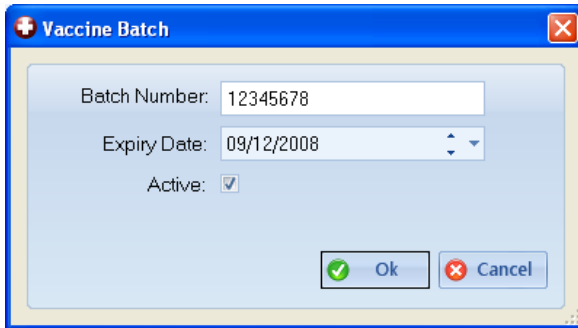
[Edit] [Add] [Delete]

[Ok] [Cancel]

When adding a new vaccine you will need to enter the following information.

- Drug
- Type
- Default Site
- Default Method

You will then need to add the batch. To add a batch, click on the Add button.



Vaccine Batch

Batch Number: 12345678

Expiry Date: 09/12/2008

Active: ☒

Ok Cancel

Here you need to enter the Batch Number, the Expiry Date and whether the batch is Active.
Click OK when you are finished and this will add this batch to the Vaccine.

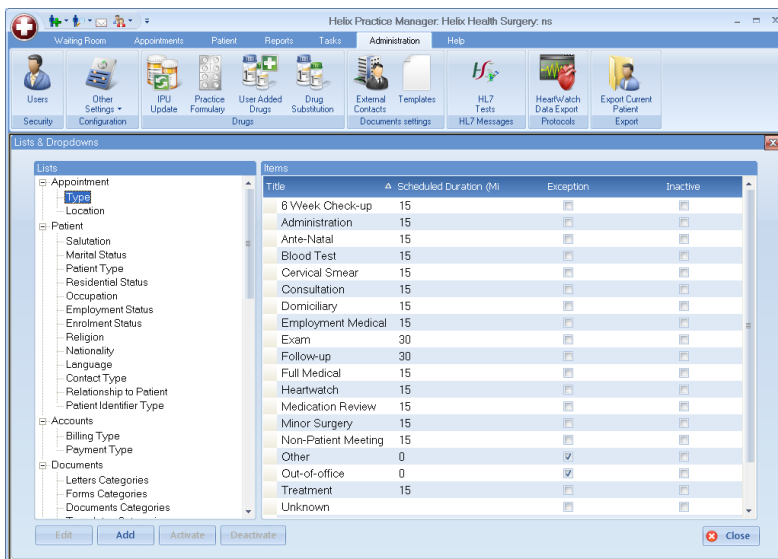
Once all relevant details have been entered click OK and this vaccine will now be saved.

Edit a Vaccine

It is also possible to edit a vaccine. You may want to add a new batch or add notes. Select the vaccine you want to edit from the list of vaccines and click Edit.

Lists + Dropdowns

The list and Dropdowns section will allow you add or modify options available on any of the lists and dropdowns.



You can edit and add to the following sections and topics.

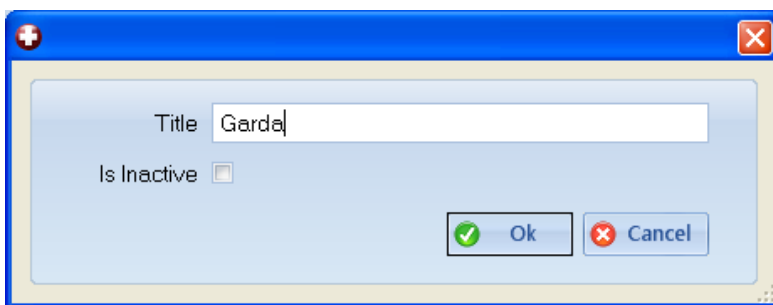
- Appointment
 - Type
 - Consultation Type
 - Location
 - Appointment Category
 - Appointment Cancellation Type
- Patient
 - Salutation
 - Marital Status
 - Patient Type
 - Residential Status
 - Occupation
 - Employment Status
 - Enrolment Status
 - Religion

- Nationality
 - Language
 - Contact Type
 - Relationship to Patient
 - Patient Identifier Type
 - Insurance Groups & Patient Identifier Sub Type
 - Insurance Plans
- Accounts
 - Billing Type
 - Payment Type
 - Invoice Discount Type
 - VAT Rate
 - Billing Category
- Documents
 - Letters Categories
 - Forms Categories
 - Documents Categories
 - Templates Categories
 - Scan Types
- Medical
 - Recall Type
 - Immunisation Type
 - Alerts
 - Allergy
 - Reaction
 - Consultation Note Categories
 - Consultation Note Templates
 - Consultation Note Summary List
 - Clinical Exam Categories
 - Medical Condition Categories
 - Clinical Exam Result List

- POHR
 - Prescription Types
 - Medication Cancellation Types
- Drugs
 - Form
 - Strength
 - Directions
- Users
 - User Affiliations
- External Contacts
 - Speciality
 - Category
 - Hospitals

To add to a topic, choose the topic and click the button.

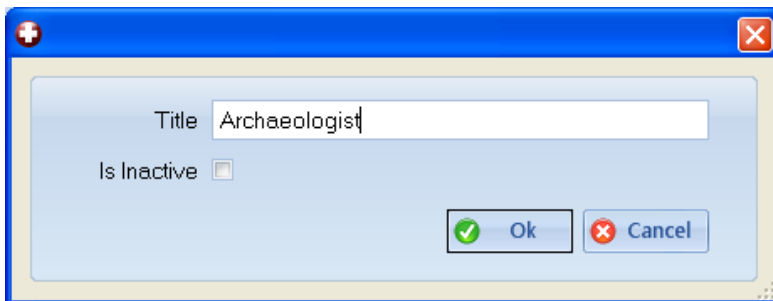
Add



Enter the details and click OK

To edit a topic, choose the topic and click the button.

Edit



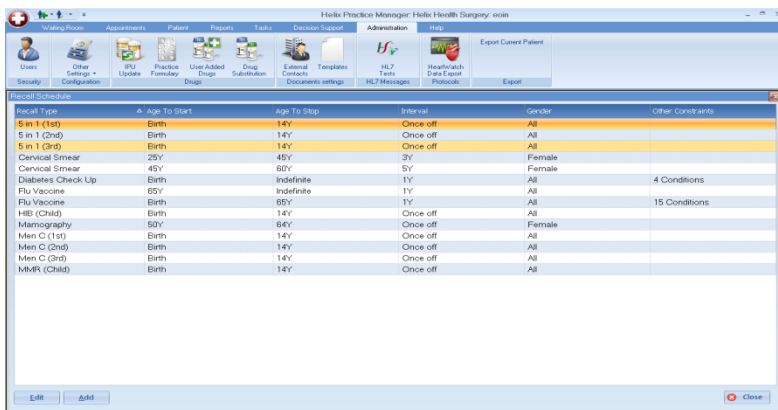
A screenshot of a software dialog box with a blue title bar and standard window controls (minimize, maximize, close). The dialog has a light blue background. It contains a text input field labeled 'Title' with the text 'Archaeologist' entered. Below this is a checkbox labeled 'Is Inactive' which is currently unchecked. At the bottom right of the dialog are two buttons: 'Ok' with a green checkmark icon and 'Cancel' with a red X icon.

You can set the topic as inactive and it will no longer appear on the list.

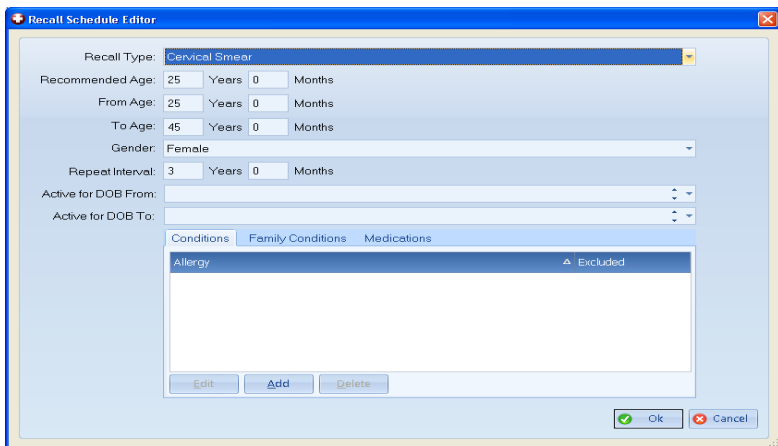
Recalls

Recall Schedules

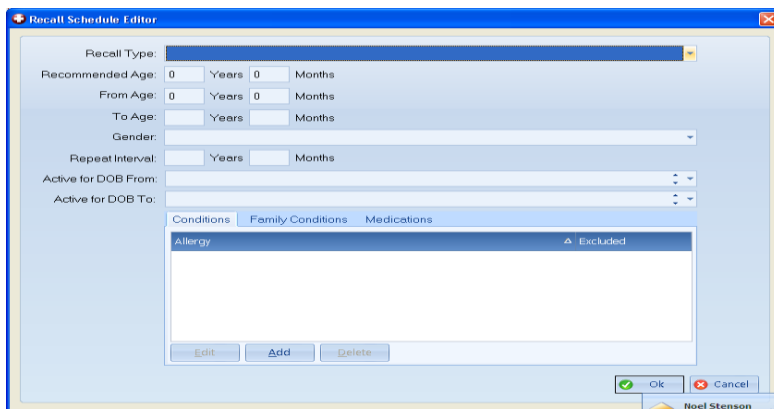
The recall schedule is used to group together patients with particular criteria. It can be used to identify and contact groups of patients by SMS, email and Mail.



You can edit a current recall schedule by clicking the **Edit** button.



You can also add a new recall schedule by clicking the **Add** button.



The image shows a software window titled "Recall Schedule Editor". It contains several input fields for configuring a recall schedule:

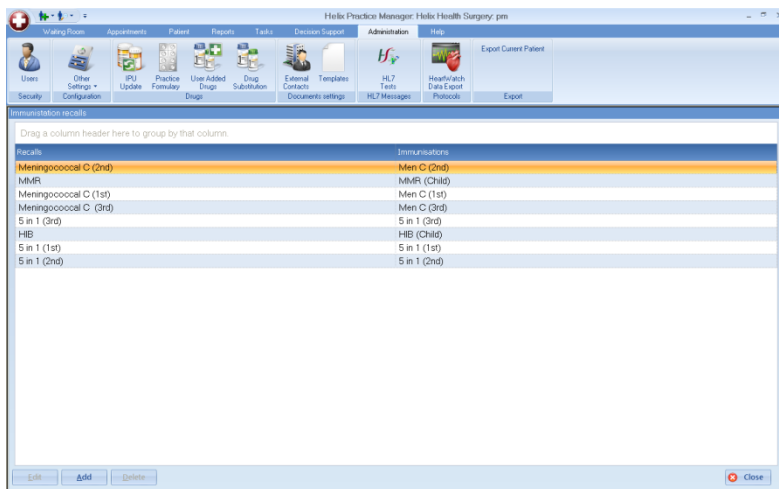
- Recall Type:** A dropdown menu.
- Recommended Age:** Two input boxes for "Years" and "Months", both set to 0.
- From Age:** Two input boxes for "Years" and "Months", both set to 0.
- To Age:** Two input boxes for "Years" and "Months".
- Gender:** A dropdown menu.
- Repeat Interval:** Two input boxes for "Years" and "Months".
- Active for DOB From:** A dropdown menu.
- Active for DOB To:** A dropdown menu.

Below these fields are three tabs: "Conditions", "Family Conditions", and "Medications". The "Conditions" tab is selected, showing a list with one entry: "Allergy" with a status of "Excluded". At the bottom of the list are three buttons: "Edit", "Add", and "Delete".

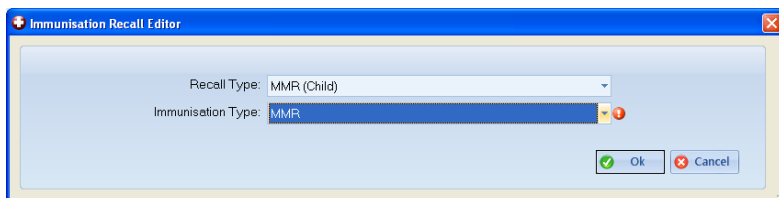
At the bottom right of the window are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon). Below these buttons is a small icon of a person and the name "Noel Stenson".

Immunisation Recalls

This section allows the user to setup immunisation recalls. The recalls will have been set up in the List and drops section. The immunisations will also have been set up in the vaccines section. Both have been explained earlier.

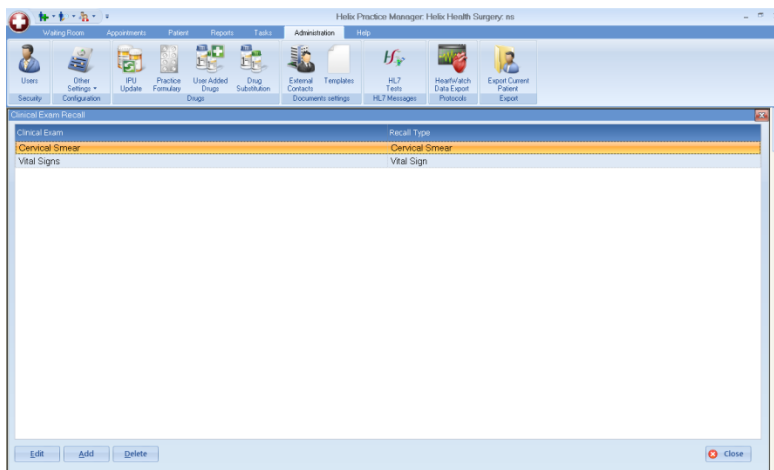


To set up a new link between a recall and an immunisation click on ADD and select the required options.

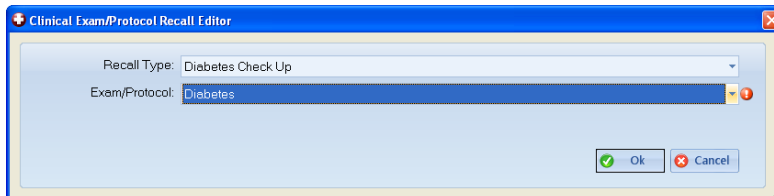


Exam/Protocol Recalls

This section allows the user to setup recalls for exams and protocols.



Click Add to add in a new Recall type. Match the name of the recall type to a specific exam.



Once this is created, you can go into Recall Schedules to setup the schedule of when and to which patients it should be due.

Exams & Tests

Exam Configuration

This area allows the user to set up or edit exams. To edit an exam click on the exam name and click on edit. To add a new exam, click Add and enter the title and priority.

To add in a test for this exam click on Add and a list of test will appear.

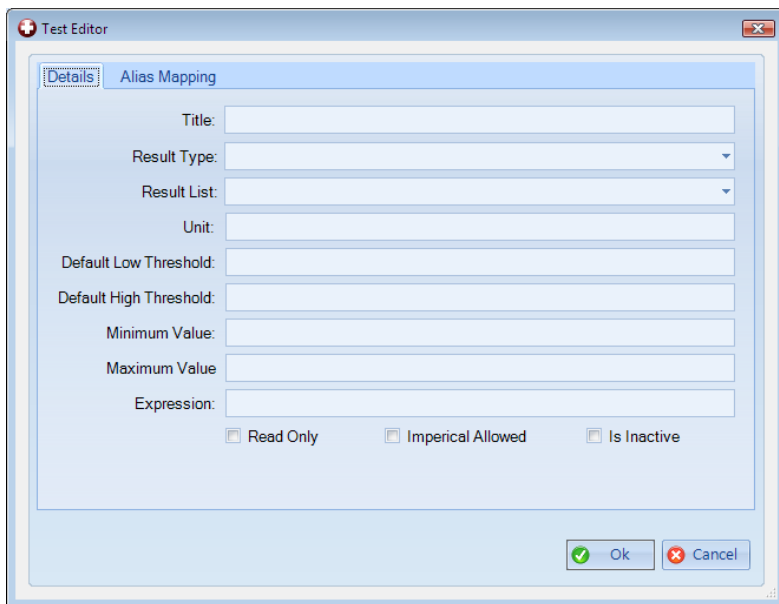
The screenshot shows the 'Exam Editor' window. It has a 'Details' tab selected, showing configuration for 'HL7 Mapping'. The 'Title' and 'Priority' fields are empty. There are several checkboxes: 'Is Default', 'Is Multiple Instance', 'Show Header', 'Read Only', 'Is Microbiological', 'Is Inactive', 'Notify Patient', and 'Notify User when Abnormal'. Below these is a table for 'Tests in Exam' with columns 'Name', 'Unit', 'Min Value', 'Max Value', and buttons 'Move Up' and 'Move Down'. The table is currently empty. At the bottom of the table area are 'Add' and 'Remove' buttons. To the right is a section 'Available in Categories' with a 'Name' dropdown and an empty list. At the bottom right are 'Add' and 'Remove' buttons. At the very bottom are 'Ok' and 'Cancel' buttons.

Tests in Exam:				
Name	Unit	Min Value	Max Value	

If the test is not in the list a then it can be created in the test configuration.

Test Configuration

This displays all the current tests. To edit an existing one click on the required test and click edit. To add a new one click on Add.



The screenshot shows a window titled "Test Editor" with a close button in the top right corner. Inside the window, there is a tab labeled "Details" and a sub-tab labeled "Alias Mapping". The "Alias Mapping" sub-tab contains several input fields and checkboxes:

- Title: [Text input field]
- Result Type: [Dropdown menu]
- Result List: [Dropdown menu]
- Unit: [Text input field]
- Default Low Threshold: [Text input field]
- Default High Threshold: [Text input field]
- Minimum Value: [Text input field]
- Maximum Value: [Text input field]
- Expression: [Text input field]

Below the input fields, there are three checkboxes:

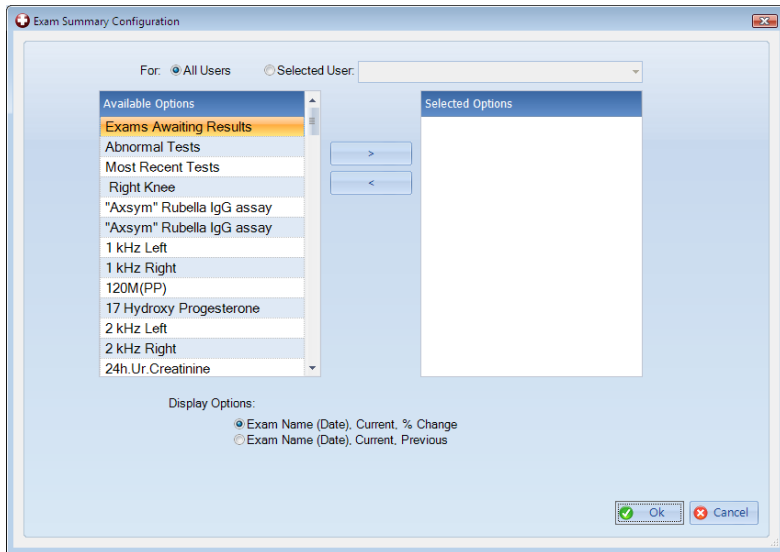
- ☐ Read Only
- ☐ Imperial Allowed
- ☐ Is Inactive

At the bottom right of the dialog, there are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon).

This enables the user to create a new test, by entering a title, test type, etc...

Exam Summary Configuration

This area allows the user to set up what test appear on the main health summary screen.



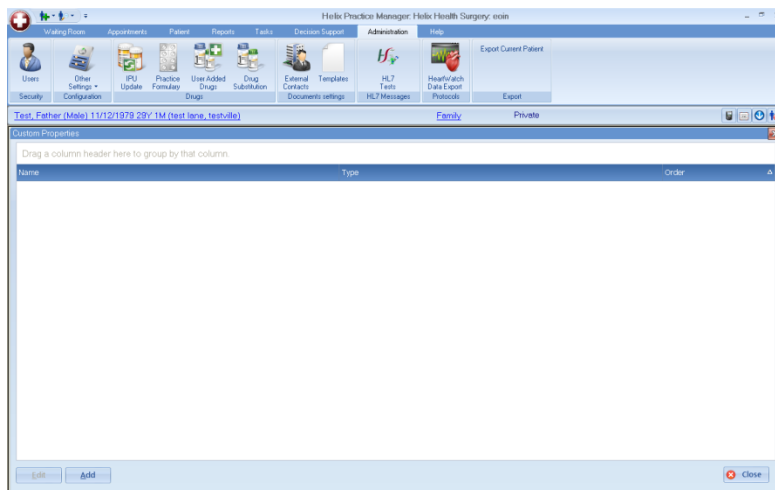
Select the required test on the left and arrow over to the right side. This can be done for all users or a specific user.

Merge Exams and Tests

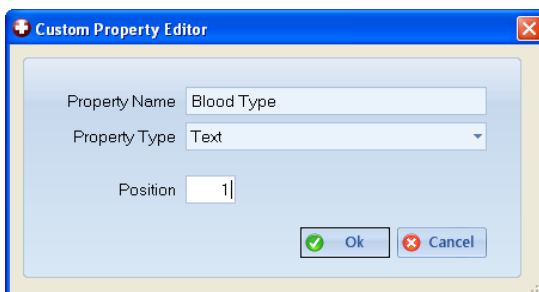
Exams and Tests can now be merged; this will cut down on duplicates.

Custom Properties

This area allows the user to add in extra fields in the patient registration area. There is a tab called User Defined, when registering a patient which is where the details will be displayed.



To add a new field click on Add. Enter property name and select property type. The position can also be altered here.

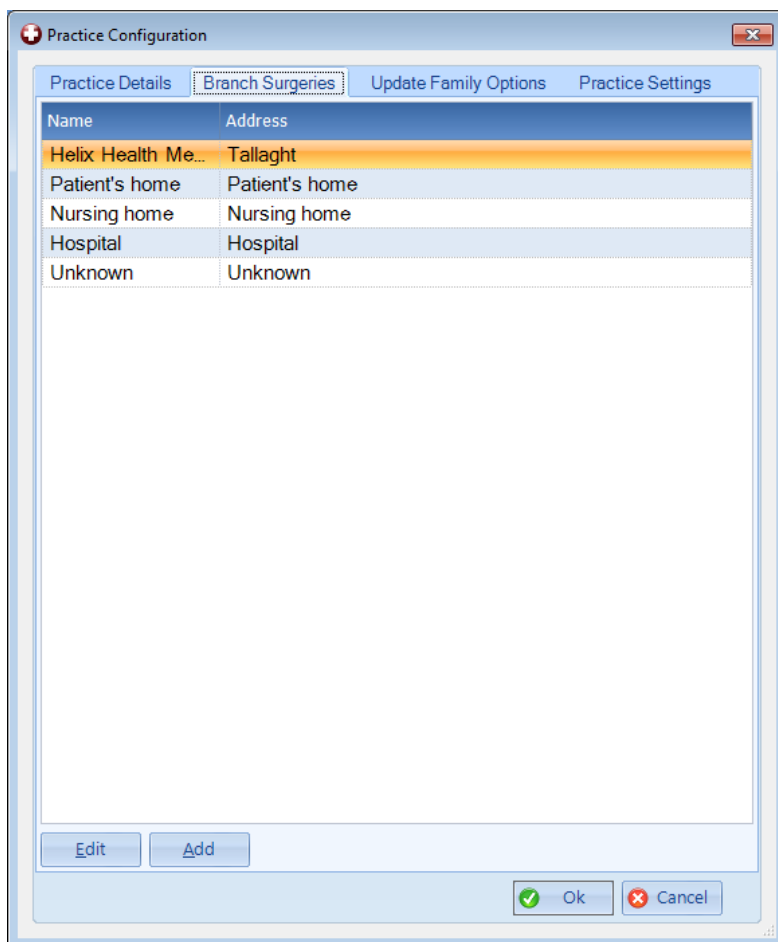


Practice Configuration

The screenshot shows a 'Practice Configuration' dialog box with a title bar containing a red cross icon and the text 'Practice Configuration'. The dialog has three tabs: 'Practice Details' (selected), 'Branch Surgeries', and 'Update Family Options'. The 'Practice Details' tab contains the following fields and controls:

- Practice Name: Text box containing 'Helix Health Medical Centre'
- National Agency Identifier: Text box
- Primary Care Team: Text box
- Primary Care Team Code: Text box
- Heartwatch Number: Text box
- Condition Encoding: Dropdown menu with 'Default' selected
- Audit Changes: Checkmark ☒
- Lock Health Items After: Text box containing '24' followed by 'Hours'
- TeleHealth Pod User: Dropdown menu
- Default Exam: Dropdown menu
- Consider late after: Text box containing '0' followed by 'Mins'
- Use Clinical Coding: Checkmark ☒
- Send SMS after new appt: Checkmark ☐
- Send Email after new appt: Checkmark ☐
- HealthLink Referral enabled: Checkmark ☐
- Ad-Hoc reports address: Text box
- Custom Ad-Hoc address: Text box
- Print Controlled Drugs: Checkmark ☒
- Locations for invoices: Checkmark ☐
- Script Details: Button
- Ok: Button with a green checkmark icon
- Cancel: Button with a red cross icon

The Practice Details tab will allow you to enter the details of your practice such as the Practice Name and Heart-watch Number.



If a practice has a number of surgeries you can add each of the surgeries details to this tab.

When you update details of one member of a family group, you are asked what details to merge. You can choose the default selection for this in the Update Family Option Tab.

The screenshot shows a 'Practice Configuration' dialog box with four tabs: 'Practice Details', 'Branch Surgeries', 'Update Family Options' (which is selected and highlighted with a dashed border), and 'Practice Settings'. The 'Update Family Options' tab contains a list of fields, each with a checkbox to its right, indicating which details should be merged. The fields are: Surname, Address, Registered GP, Email Address, Home Phone Number, Mobile Number, Work Number, and Fax Number. At the bottom right of the dialog box are 'Ok' and 'Cancel' buttons, each with a small icon (a green checkmark for 'Ok' and a red 'X' for 'Cancel').

Field	Checkbox
Surname:	<input type="checkbox"/>
Address:	<input type="checkbox"/>
Registered GP:	<input type="checkbox"/>
Email Address:	<input type="checkbox"/>
Home Phone Number:	<input type="checkbox"/>
Mobile Number:	<input type="checkbox"/>
Work Number:	<input type="checkbox"/>
Fax Number:	<input type="checkbox"/>

The Practice Settings tab contains the following settings:

The screenshot shows the 'Practice Configuration' window with the 'Practice Settings' tab selected. The window contains various settings for a practice, including form download service URL, retention tax rate, lab code, and several checkboxes for enabling features like DirectTwain Scanning, Dispensing, and Models for Accounts. There are also input fields for length of medical condition and consultation text, and a range selector for showing unavailable time slots. At the bottom, there are fields for pharmacy connector path and name, and a checkbox for printing account notes by default. The window has a standard Windows-style title bar and buttons for 'Ok' and 'Cancel'.

Setting	Value
Form Download Service Url:	http://www.helixhealthonline.com/FormDownloadService/service.aspx
Retention Tax (%):	20.0000
Lab Code:	
Use DirectTwain Scanning:	<input type="checkbox"/>
Dispensing Enabled:	<input type="checkbox"/>
Dual Planner Colour:	<input type="checkbox"/>
Force bill under selection:	<input checked="" type="checkbox"/>
Use Models For Accounts:	<input checked="" type="checkbox"/>
Allow Associated Invoices:	<input type="checkbox"/>
Depart Users confirmation :	<input checked="" type="checkbox"/>
Hide unavailable time slots:	<input checked="" type="checkbox"/>
Show from:	6
to:	20
Show all appointments due today in waiting room:	<input type="checkbox"/>
Length Medical Condition Text:	0
Length Consultation Text:	0
Use Models For Reports:	<input checked="" type="checkbox"/>
Use App Cancellation :	<input checked="" type="checkbox"/>
Use user's outlook for email:	<input type="checkbox"/>
Use TS Colour Performance:	<input type="checkbox"/>
Pharmacy Connector Path:	
Pharmacy Connector Name:	
Print account notes by default:	<input type="checkbox"/>

- **Form Download URL:** The Url for downloading forms
- **Retention tax rate:** Set the retention tax rate here
- **Use Models for Accounts:** When checked you can configure your account template with items from the helix manager tab in the rtf editor
- **Allow Associated Invoices:** When checked you can add an invoice and at a later date add an associated invoice to it in the accounts section. You will then see part 1 of 2 and part 2 of 2 for example in the patient's accounts.
- **Depart Users Confirmation:** When checked and you depart a patient from the waiting room it will ask you are

you sure. If not checked the patient will be departed and you will not get this prompt.

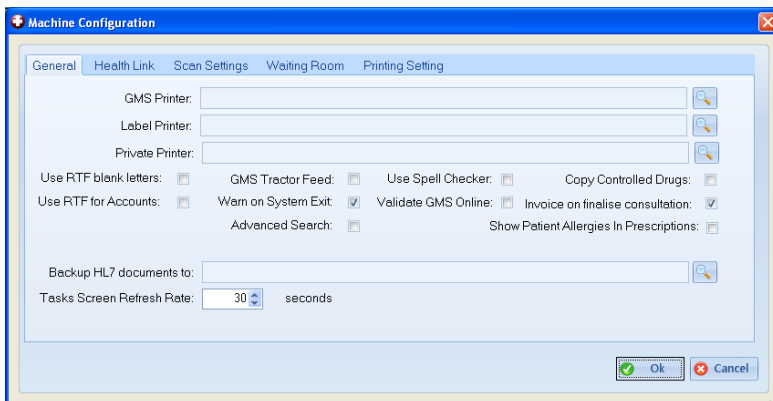
- **Hide unavailable time slots:** When checked it will hide unavailable time slots in the Appointments Planner
- **Show Times From – To:** If the previous setting is selected, use the 'To' and 'From' times here to show additional time slots in the planner.
- **Show all appointments due today in waiting room:** When checked it will show all appointments scheduled today in the bottom half of the waiting room. If not checked it will return the appointments scheduled in the next 3 hours.

Machine Configuration

This section will be primarily used by the installation engineer. This area is divided up into three sections: General, Health Link and Scan Settings.

General

This screen holds information about printer settings, consultation settings, waiting room options, shutdown options, etc.



The 'Machine Configuration' dialog box is shown with the 'General' tab selected. It contains several input fields and checkboxes. The 'GMS Printer', 'Label Printer', and 'Private Printer' fields each have a magnifying glass icon to the right. The checkboxes are arranged in two rows: 'Use RTF blank letters', 'GMS Tractor Feed', 'Use Spell Checker', and 'Copy Controlled Drugs' in the first row; 'Use RTF for Accounts', 'Warn on System Exit' (checked), 'Validate GMS Online', and 'Invoice on finalise consultation' (checked) in the second row. Below these is 'Advanced Search' and 'Show Patient Allergies In Prescriptions'. At the bottom, there is a 'Backup HL7 documents to:' field with a magnifying glass icon, and a 'Tasks Screen Refresh Rate' set to '30' seconds. 'Ok' and 'Cancel' buttons are at the bottom right.

Machine Configuration

General Health Link Scan Settings Waiting Room Printing Setting

GMS Printer: [text box] [magnifying glass]

Label Printer: [text box] [magnifying glass]

Private Printer: [text box] [magnifying glass]

Use RTF blank letters: ☐ GMS Tractor Feed: ☐ Use Spell Checker: ☐ Copy Controlled Drugs: ☐

Use RTF for Accounts: ☐ Warn on System Exit: ☒ Validate GMS Online: ☐ Invoice on finalise consultation: ☒

Advanced Search: ☐ Show Patient Allergies In Prescriptions: ☐

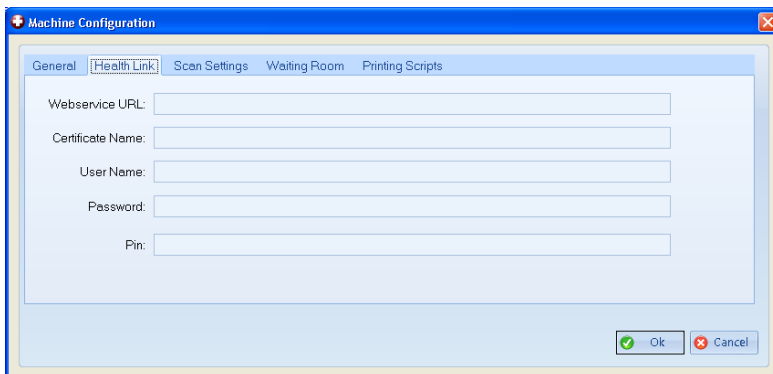
Backup HL7 documents to: [text box] [magnifying glass]

Tasks Screen Refresh Rate: 30 seconds

Ok Cancel

Health Link

This screen has information on registration details for logging on to download results.



The 'Machine Configuration' dialog box is shown with the 'Health Link' tab selected. It contains five input fields: 'Webservice URL', 'Certificate Name', 'User Name', 'Password', and 'Pin'. Each field has a magnifying glass icon to the right. 'Ok' and 'Cancel' buttons are at the bottom right.

Machine Configuration

General Health Link Scan Settings Waiting Room Printing Scripts

Webservice URL: [text box] [magnifying glass]

Certificate Name: [text box] [magnifying glass]

User Name: [text box] [magnifying glass]

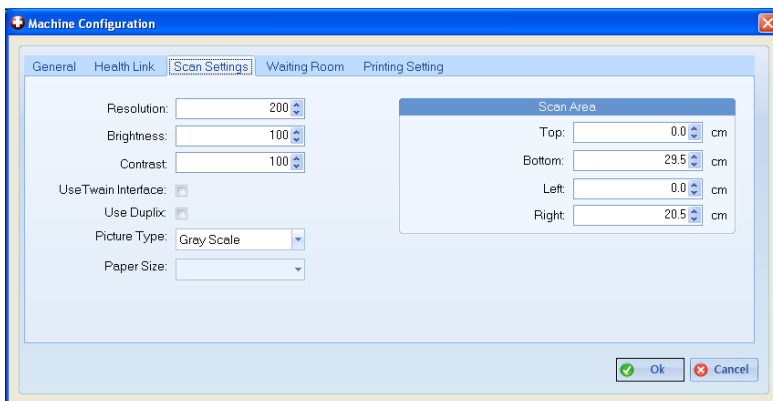
Password: [text box] [magnifying glass]

Pin: [text box] [magnifying glass]

Ok Cancel

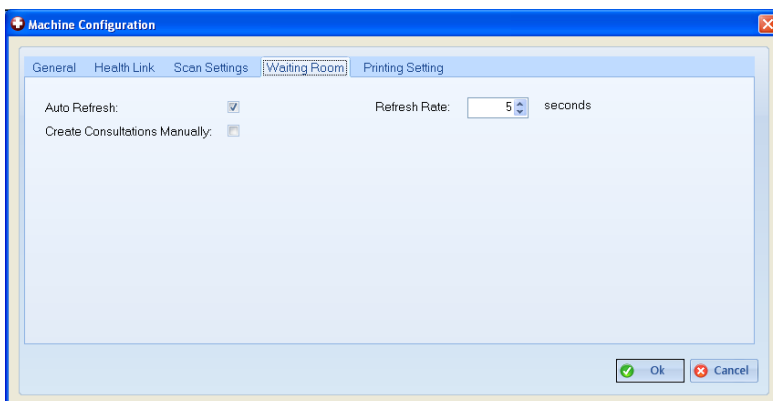
Scan Settings

This screen records the information for saving scans.



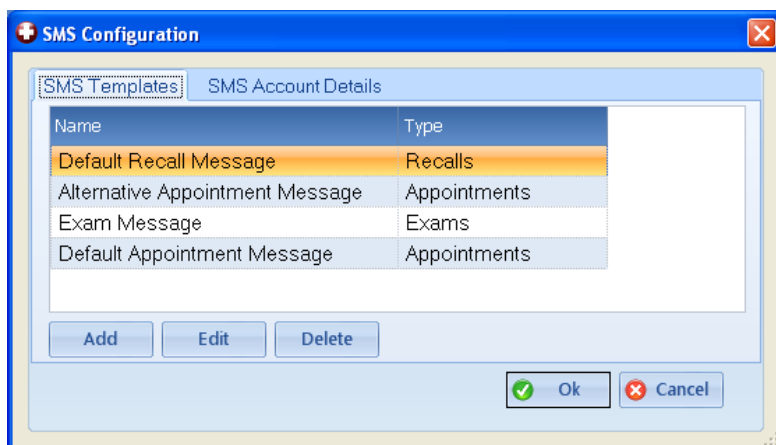
Waiting Room

This section holds setting for the Waiting room section.

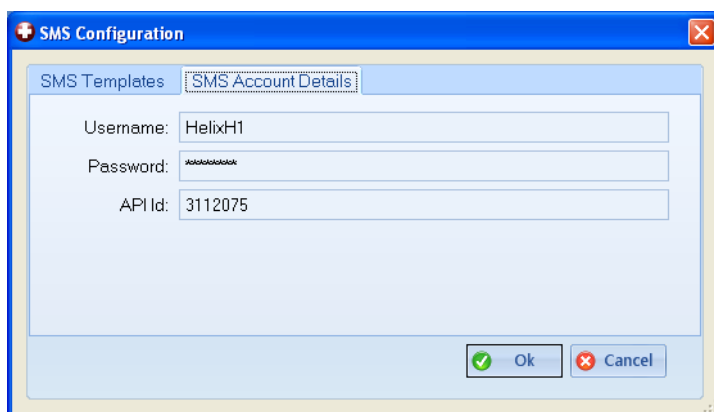


SMS Configuration

In this section you can configure and add SMS templates

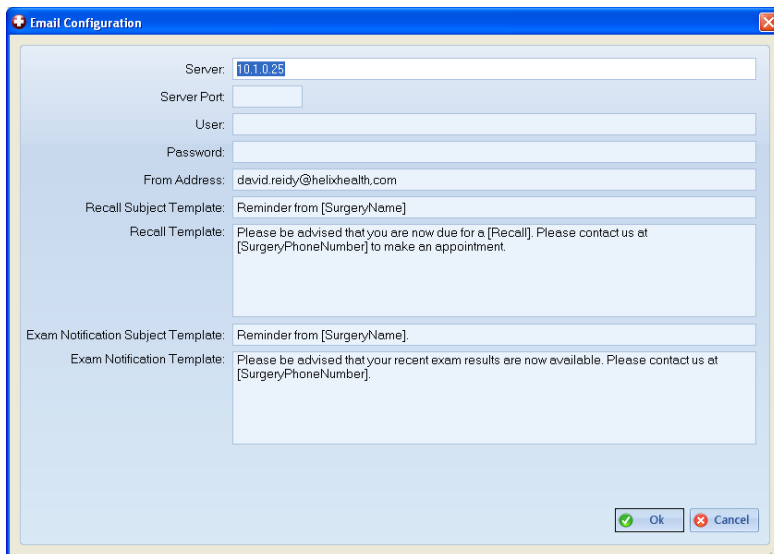


In the SMS Account Details you need to enter the account details of your SMS provider. Username, password and API id number will be provided by the SMS provider.



Email Configuration

This section will be primarily used by the installation engineer. It will be set up on installation



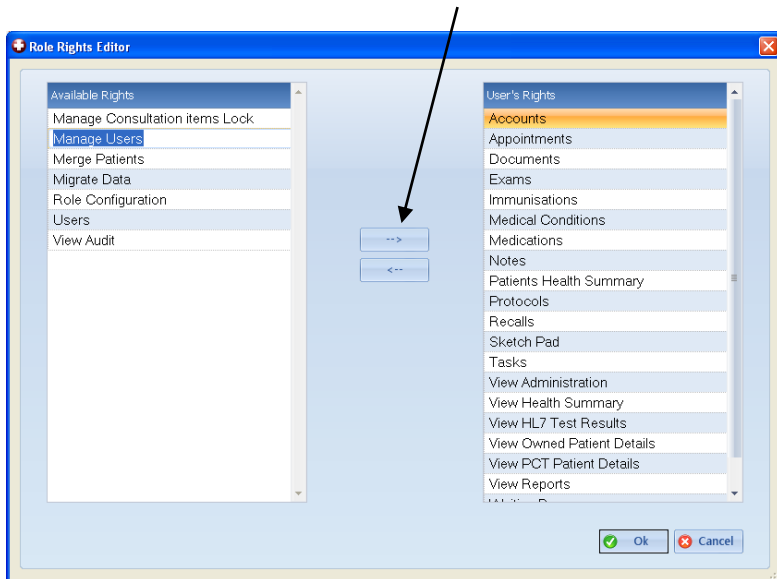
The image shows a Windows-style dialog box titled "Email Configuration". It contains several input fields for configuring email settings. The "Server" field is pre-filled with "10.1.0.25". The "From Address" field is pre-filled with "david.reidy@helixhealth.com". The "Recall Subject Template" and "Exam Notification Subject Template" fields are pre-filled with "Reminder from [SurgeryName]". The "Recall Template" and "Exam Notification Template" fields contain placeholder text for recall and exam notification emails, respectively. At the bottom right, there are "Ok" and "Cancel" buttons.

Server:	10.1.0.25
Server Port:	
User:	
Password:	
From Address:	david.reidy@helixhealth.com
Recall Subject Template:	Reminder from [SurgeryName]
Recall Template:	Please be advised that you are now due for a [Recall]. Please contact us at [SurgeryPhoneNumber] to make an appointment.
Exam Notification Subject Template:	Reminder from [SurgeryName].
Exam Notification Template:	Please be advised that your recent exam results are now available. Please contact us at [SurgeryPhoneNumber].

Role Configuration

Here you can assign certain rights to certain user types.

Select the user type from the list, e.g. Receptionist. Then click on the rights available and move them to the right hand side, User Rights, using the arrows.



IPU Update

The Irish Pharmacy Union sends us monthly updates to their drug file and it is very important that you update your Helix Practice Manager system to reflect these changes.

We will make the latest IPU file available to you on a monthly basis. Please make sure that you check our website regularly for these updates.

NOTE: This update will take approximately 45 minutes to complete. All users must be off the system at the time of the update.

You must download the latest file from our website. You can access our website by clicking on the following link:

http://www.helixhealth.com/component/option,com_docman/Itemid,856/

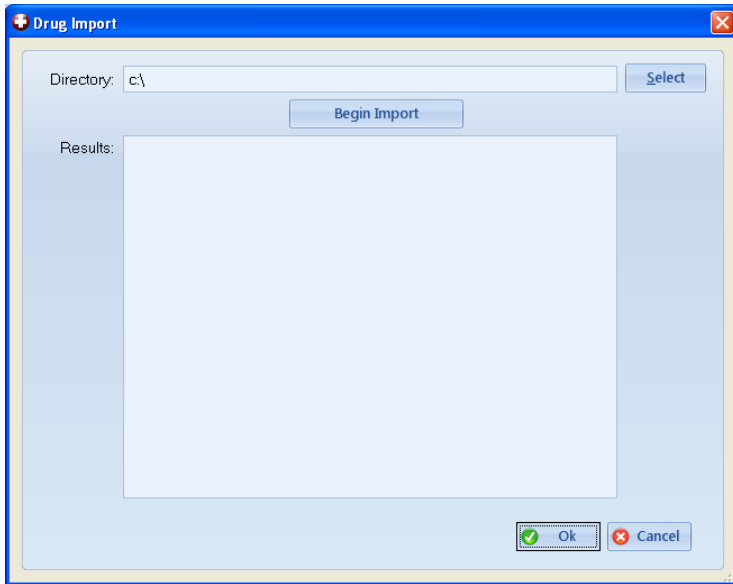
Here, you will see a category called 'Helix Practice Manager IPU'. When you click on this link, you will see IPU update files for several months. You should select the latest month.

Choose to download this file and save it to a location on your computer. We would recommend that you save it to a folder named 'IPU Updates' (you might need to create this folder on your computer if you are doing this for the first time).

You should unzip the folder to this location.

Note: It doesn't matter if you skip a month, the latest file will still update your system with data from previous months.

Open up the HPM application and click on the Administration Tab. Click on the 'IPU Update' button.



You now must select the directory in which you have previously saved the downloaded file on your computer.

Click on the 'Select' button and this will enable you to choose the directory in which your file exists.

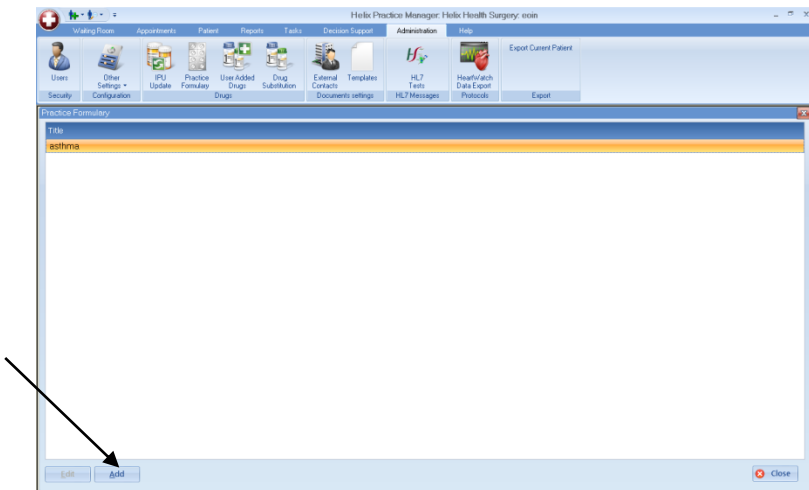
Once you have selected the correct folder you should click on the 'Begin Import' button.

This will take approximately 45 minutes and no users should be on the system during this period.

Practice Formulary

This area allows the user to associate drugs from the IPU list to a specific category; this will allow the doctor to select the category and will save time when prescribing.

It allows the user to categorise drugs according to medical groupings i.e. you can enter all the drugs associated with dermatology in one group and all the drugs associated with contraception in another group.



To add a new category click add.

Practice Formulary Details

Title:

Item Details

Drug	Direction	Days	Qty	Repeats
------	-----------	------	-----	---------

(No Drug selected)

First, enter the Title of the category. Then add in the drugs to include in the category by clicking Add.

Practice Formulary Item Details

Drug:

☐ Controlled

Directions:

☒ Codes

Days Supply: Quantity:

☐ Long term Unit:

Repeats: ☐ Use As Default

Notes:

Drug Usage Review:

Warnings for selected drug
Take an hour before food, or on an empty stomach.
May cause dizziness. If affected, do not drive or operate machinery.

Contraindications for selected drug
Discontinue if rash develops, and consult the doctor.
Reversible tooth discoloration and/or taste and smell disturbance may occur with this product.
Avoid OR Caution in Pregnancy and/or Lactation
Not recommended for nursing mothers.

Fill in the following:

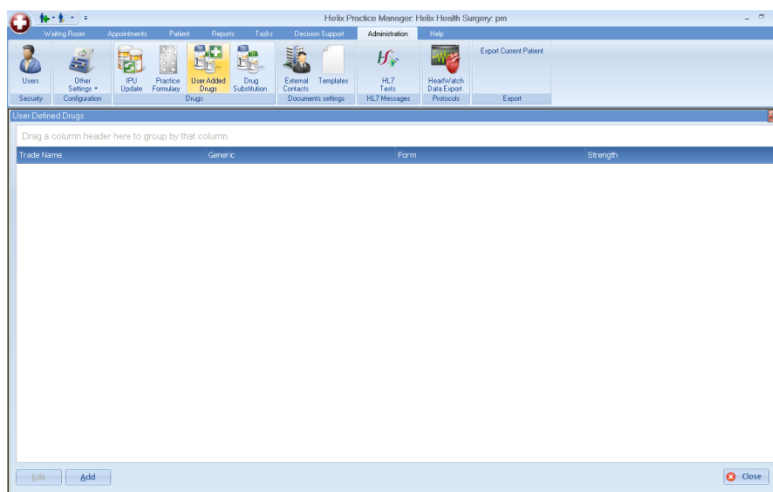
- Drug
- Directions
- Days Supply
- Quantity
- Unit
- Long Term
- Repeats
- Notes

These details will be assigned to these drugs only when prescribing using this category. They can be changed at the time of prescribing.

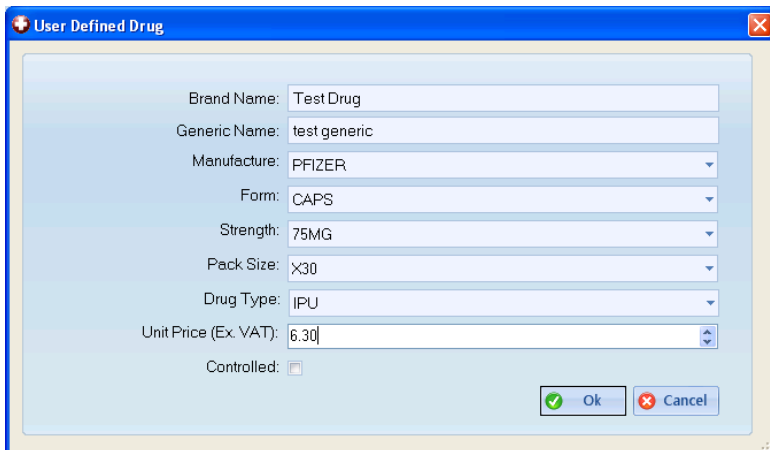
Continue to add in as many drugs as needed. This category can then be used when prescribing. For details see the Prescribing chapter.

User Added Drugs

You may need to avail of the option to manually add in your own drugs to the current list of drugs. This may occur if you are prescribing a newly-launched drug between drug updates. As the drug database is regularly updated, this feature should only be used when absolutely necessary.



To add a new drug, click Add then simply fill in the required fields. There are no mandatory fields on this screen, so only fill in the details you have.



User Defined Drug

Brand Name: Test Drug

Generic Name: test generic

Manufacture: PFIZER

Form: CAPS

Strength: 75MG

Pack Size: X30

Drug Type: IPU

Unit Price (Ex. VAT): 6.30

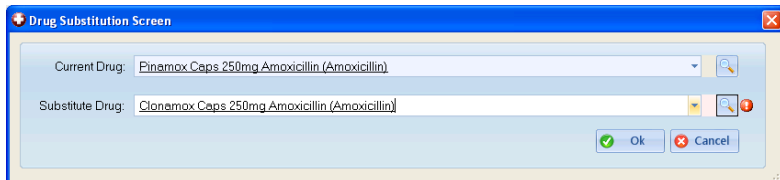
Controlled: ☐


Ok Cancel

Drug Substitution

The drug substitution section is used to replace discontinued drugs for another type of drug.

To replace a certain drug for another, click on the Drug Substitution section.



Type the name of the Current Drug and the Substitute drug (new drug) in the relevant fields. Use the Search button , to refine your search. Click Ok when you have made your selection.

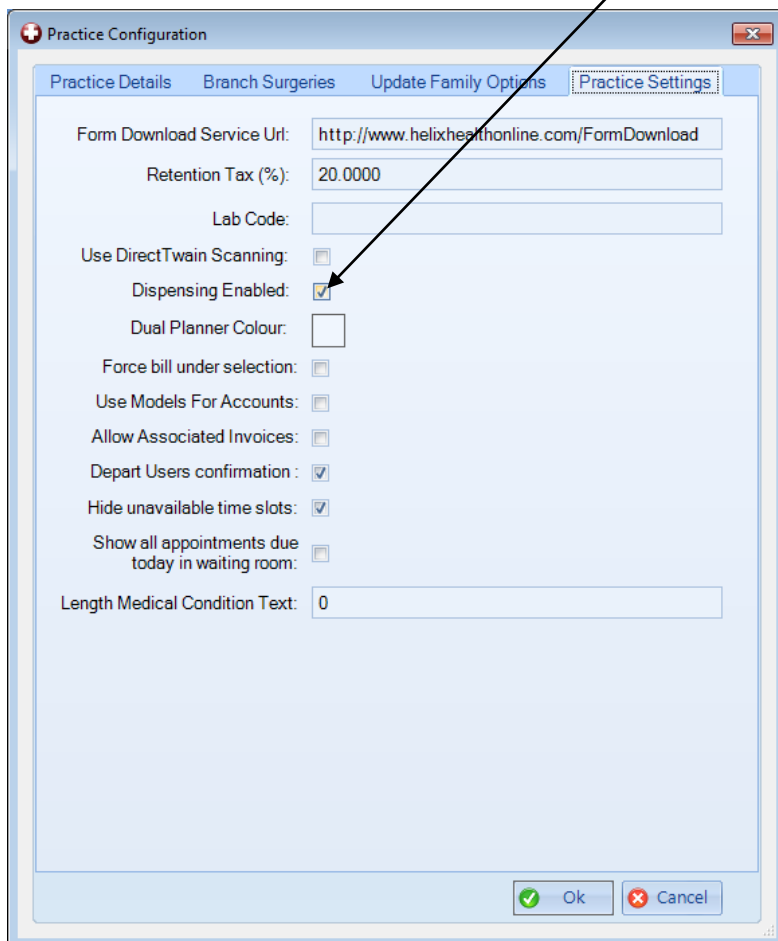
All patients who were on the previous drug will be switched to the new one on their next repeat (when the drug is next copied).

Manage Stock

This section is used for dispensing practices to manage drugs that the surgery keeps in stock.

This option will not appear in the administration section until it is activated. To activate the Stock Management option, go to Administration, Other Settings and Practice Configuration.

Click on the Practice Settings tab and tick the box labelled Dispensing Enabled.



The screenshot shows the 'Practice Configuration' dialog box with the 'Practice Settings' tab selected. The dialog has a title bar with a red cross icon and a close button. The tabs are 'Practice Details', 'Branch Surgeries', 'Update Family Options', and 'Practice Settings'. The 'Practice Settings' tab contains the following fields and checkboxes:

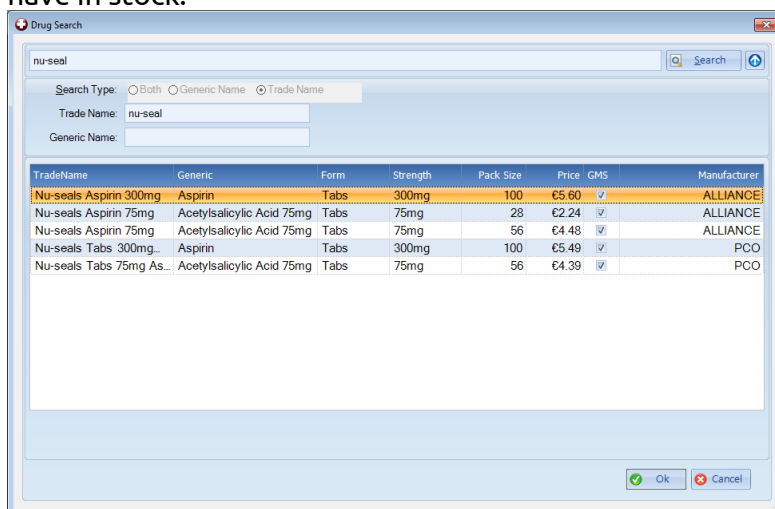
- Form Download Service Url:
- Retention Tax (%):
- Lab Code:
- Use DirectTwain Scanning: ☐
- Dispensing Enabled: ☒ (indicated by an arrow from the text above)
- Dual Planner Colour:
- Force bill under selection: ☐
- Use Models For Accounts: ☐
- Allow Associated Invoices: ☐
- Depart Users confirmation : ☒
- Hide unavailable time slots: ☒
- Show all appointments due today in waiting room: ☐
- Length Medical Condition Text:

At the bottom right, there are 'Ok' and 'Cancel' buttons.

You will need to close and re-open Practice Manager for this change to take effect. Once you have logged back in you can start adding stock to your system.

Adding Stock

Go to Administration and Manage Stock. Click the Add button to add stock for a drug. Search for the drug you have in stock:



Drug Search

Search: nu-seal

Search Type: ☐ Both ☐ Generic Name ☒ Trade Name

Trade Name: nu-seal

Generic Name:

TradeName	Generic	Form	Strength	Pack Size	Price	GMS	Manufacturer
Nu-seals Aspirin 300mg	Aspirin	Tabs	300mg	100	£5.60	✓	ALLIANCE
Nu-seals Aspirin 75mg	Acetylsalicylic Acid 75mg	Tabs	75mg	28	£2.24	✓	ALLIANCE
Nu-seals Aspirin 75mg	Acetylsalicylic Acid 75mg	Tabs	75mg	56	£4.48	✓	ALLIANCE
Nu-seals Tabs 300mg...	Aspirin	Tabs	300mg	100	£5.49	✓	PCO
Nu-seals Tabs 75mg As...	Acetylsalicylic Acid 75mg	Tabs	75mg	56	£4.39	✓	PCO

OK Cancel

Select the required drug and click OK.

Drug Stock

Drug: Nu-seals Aspirin 75mg Tabs 75mg (Acetylsalicylic Acid)

Quantity in Stock:	0.0	As Packs:	0.0
Reorder Level:	0.0	As Packs:	0.0
Default Qty to Order:	0.0	As Packs:	0.0
Qty Ordered:	0.0	As Packs:	0.0
Date Ordered:			

Ok Cancel

The name of the drug appears at the top of this screen, you can then fill in the following:

- Quantity in Stock – This is the amount of tablets/Packs you currently have in stock
- Reorder Level – This is the quantity at which the system will prompt you to order more stock when you are dispensing.
- Default Quantity to order – This is the default amount of the drug that will be ordered when you try to add that drug to an order.
- Qty Ordered – Fill in the tablets/Packs you want to order now (if required)
- Date Ordered - You can record the date the drug was last ordered in this field.

Click OK and this drug will go into your stock list.

Edit

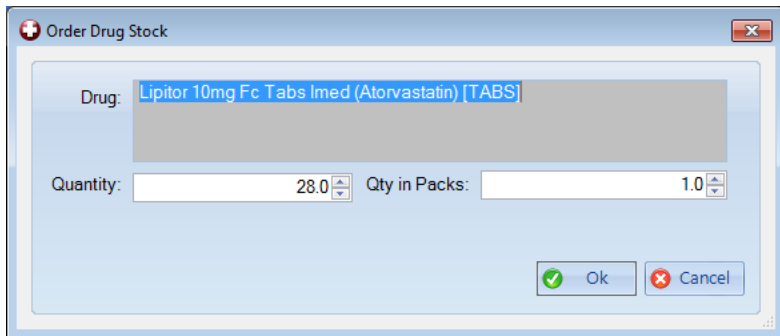
Use the edit option to edit or check the stock details of any drug.

Delete

Use the delete option to remove any drug from your stock list.

Ordering Drugs

To order a drug select it from your list and click the Order selected option. You will see the following screen:



The screenshot shows a dialog box titled "Order Drug Stock" with a close button (X) in the top right corner. Inside the dialog, there is a text field labeled "Drug:" containing the text "Lipitor 10mg Fc Tabs Imed (Atorvastatin) [TABS]". Below this, there are two input fields: "Quantity:" with a value of "28.0" and "Qty in Packs:" with a value of "1.0". Both fields have up and down arrows for adjustment. At the bottom right, there are two buttons: "Ok" with a green checkmark icon and "Cancel" with a red X icon.

Enter the quantity of tablets or number of Packs that you want to order and click OK.

Once you have your required drug(s) ordered, you can print off the order form using the Create Order Form button.

The screenshot shows a 'Form Viewer' window with a form titled 'STOCK REQUIRED'. The form is divided into several sections:

- Section 1: STOCK REQUIRED** (Blue header)
 - Item 1: Lipitor 10mg Fc Tabs lined (Atorvastatin) (TABS) with a quantity of 28.
 - Items 2 through 7 are empty rows.
- Section 2: MONTH SUPPLIED** (Green header)
 - Columns for Drug Code and Computer Units Supplied.
- Section 3: THIS COL IS FOR OFFICIAL USE** (White header)
 - For official use (please leave blank).

At the bottom of the form, there is a blue bar with the text 'RECEIVED THE STOCK ITEMS LISTED IN COL. 1' and 'FOR OFFICIAL USE BY'. Below this bar, there is a checkbox for 'Automatically Print Form on Submit' and buttons for 'Delete' and 'Close'.

A new form will open with the practice details and the ordered drugs already printed on the form. Click Submit to print the form.

When the order arrives use the Check-In Selected to check in the received stock. This will update your stock levels.

Dispense While Prescribing

If you have activated the Stock functionality, when you are prescribing a new drug, you will see a new option for dispensing:

test, amy (F) 45Y 0M 09/08/1965 (test, test)

Search Type: ☐ Both ☐ Generic Name ☒ Trade Name

Drug: Nu-seals Aspirin 75mg Tabs 75mg (Acetylsalicylic Acid 75mg) [ALLIA]

☐ Controlled Add New Drug

Directions: TWICE DAILY ☐ Codes

[TWICE DAILY]

Days Supply: 28 Quantity: 56.0 Qty Dispensed: 56.0

☐ Long term Unit: Dispense

Repeats: 1 ☒ Use As Default

Review Date: 17/09/2010 Reissue Date: 17/09/2010

Condition:

Notes:

Drug Usage Review: *(No alerts found in the currently active Drug File)*

Last Updated on: Add ✓ Ok ✗ Cancel

If you are dispensing the item fill in the Qty Dispensed and click the Dispensed button to update your stock accordingly.

External Contacts

See Documents chapter for details of adding or editing external contacts

Templates

The Templates section is used to add new or edit existing document templates which are used in a number of areas

throughout HPM. Some of the templates you can edit include:

- Forms
- Letters
- Invoices / Receipts
- Patient labels
- Reports

Edit a Template

To edit a document, select it from the list and click Edit, when the Template window opens, click Edit again to open the document itself. Edit the document as needed, click the save button and close it.

Add a new Template

To add a new template, click the Add button, choose the title and category. Click the import button and choose a document from your document list, or you can add new rtf templates from the 'New Doc' button which will import a new blank document.

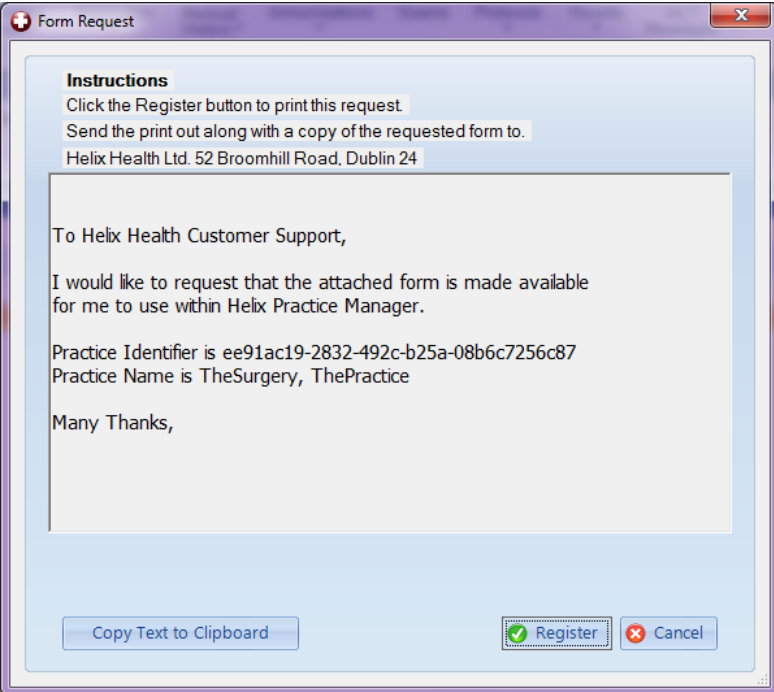
Once you have named and opened a new blank template, add in the details you need. You can choose to import details from patients or surgery demographics using the Practice Manager tab.

Click save to save your template and click X to close. Your new template is now ready to be used from the Documents section of a patients file.

See Documents chapter for more details of adding or editing templates

Form Downloads

New forms can be requested and added through this area but to avail of this service you will need to register with Helix Health first and you do this by clicking on “Request a New from” and then Register.



The image shows a 'Form Request' dialog box with a purple title bar and standard window controls. The main content area is light blue and contains the following text:

Instructions
Click the Register button to print this request.
Send the print out along with a copy of the requested form to.
Helix Health Ltd. 52 Broomhill Road, Dublin 24

To Helix Health Customer Support,

I would like to request that the attached form is made available for me to use within Helix Practice Manager.

Practice Identifier is ee91ac19-2832-492c-b25a-08b6c7256c87
Practice Name is TheSurgery, ThePractice

Many Thanks,

At the bottom, there are three buttons: 'Copy Text to Clipboard', 'Register' (with a green checkmark icon), and 'Cancel' (with a red X icon).

A list of forms that you can choose from will be displayed to put the forms into the system click on the form then click download.

Click the View button to see the form before you download it.

Name	Area	Organisation	Type	Version	Date Added	Status
Request for Ultrasound Inve...			Lab	5	12/04/2010	Download
Field Test			General	2	30/03/2010	Download
Purchase Order Requisition			Lab	6	16/03/2010	Download
Connolly Hospital Blanchardst			Lab	0	16/03/2010	Download

If the form is not in the list send the form to Helix by mail or post and we assess the form and upload where possible on to the system.

HL7 Tests

Use this section to download you Lab results and hospital messages. For details of how to use this section, see Examinations chapter.

HeartWatch Export

Use this option to export your monthly Heartwatch File. See Protocols chapter – Heartwatch section.

Company Accounts

This section is used to manage company accounts. It is explained in detail in the Accounts chapter.

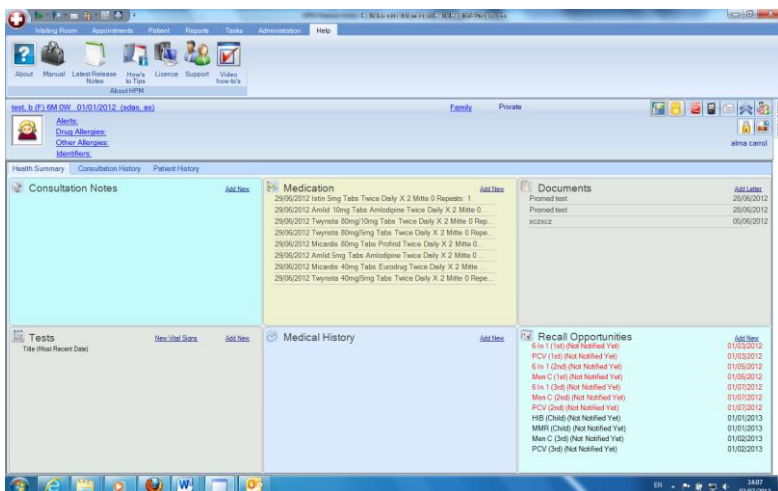
Help

In the help menu, there are 2 new options for:

1. Support
2. Video How To's

1: The support option will open up the internet page to allow our support team to dial in if required using a 6 digit code.

2: The video how to's button will bring users to our online support and learning Centre where a user can watch online tutorials on different sections of the system.



Glossary of Common Terms

Key Word Definitions

Active

The window or icon that you are currently using or that is currently selected. The next Keystroke or command you choose always applies to the active window. If a window is active, its title bar changes colour to differentiate it from other windows, and if an icon is active, its label changes colour.

Application

A computer program used for a particular kind of work, such as Helix Practice Manager. This term is often used interchangeably with “program”.

Back Up

Helix Health will be happy to advise you on the various back up options available to you.

Boot

To start or restart your computer, loading the Microsoft disk operating system (MS-DOS).

Check box

A small, square box in a dialog box that can be selected or cleared. When a check box is selected, an X appears in the

box. A check box represents an option that you can turn on or off.

Click

To press and release a mouse button quickly.

Close

To remove a window or a dialog box, or quit HPM. You close by choosing the Close command from the control menu. When you close a window by choosing an application, you quit the application.

Confirmation message

A message that appears after you specify certain actions, prompting you to confirm that you want to continue with an action or to specify that you want to cancel it.

Cut

To move data from a document to a temporary storage area called a Clipboard.

Default

In some dialog boxes, a command button that Windows automatically selects. The default button has a bold border, indicating that it will be chosen if you press ENTER. You can override a default button by choosing the Cancel button or another command button.

Default printer

The printer that is used if you choose the print command without first specifying which printer you want to use with an application. You can have only one default printer, and it should be the printer you use most often.

Desktop

The background of your screen, on which windows, icons, and dialog boxes appear.

Destination directory

The directory to which you copy or move one or more files.

Dialog box

A window that appears temporarily to request or supply information. Many dialog boxes have options you must select before a command can be carried out.

Dimmed

Unavailable or disabled. A dimmed button or a command is displayed in a different colour, and it cannot be chosen. Sometimes referred to as greyed-out.

Double click

To rapidly press or release a mouse button twice without moving the mouse. Double clicking carries out an action, such as starting an application.

Drag

To move an item on the screen by clicking the item and then, before releasing the mouse button, moving the mouse. For example you can move a window from another location on the screen by dragging its title bar.

File

A collection of information that has been given a name and is stored on a disk. This information can be a document or an application.

Icon

A graphical representation of an element in Windows, such as a disk drive, directory, group, application, or document.

Maximize

To enlarge a window to its maximum size by using the Maximize button (to the right of the title bar) or the Maximize command on the control menu.

Maximize button

The small button containing an up arrow to the right of the title bar. Mouse users can click the maximize button to

enlarge a window to its maximum size. Keyboard users can use the Maximize command on the Control menu.

Menu

A list of commands in an application window. Menu names appear in the menu bar near the top of the window. You open a menu by selecting a menu name. The Control menu, represented by the Control-menu box to the left of the title bar, is common to all Windows-based applications.

Minimize

To reduce a window to an icon by using the Minimize button (to the right of the title bar) or the Minimize command on the Control menu.

Minimize button

The small button containing a down arrow to the right of the title bar. Mouse users can click the Minimize button to reduce a window to an icon. Keyboard users can use the Minimize command on the Control menu.

Pointer

The arrow-shaped cursor on the screen that follows the movement of the mouse (or other pointing device) and indicates which area of the screen is affected when you press the mouse button. The pointer may change shape during certain tasks.

Printer driver

A program that controls how your computer and printer interact.

RAM

RAM (Random Access Memory) is, along with the microprocessor, the most important factor affecting the performance of your computer. RAM is temporary storage for the microprocessor. As the microprocessor is running it is constantly reading and writing to RAM, which stores all the most recent information that the microprocessor is using.

Scanner

A scanner is a device much like a photocopier. By placing a photograph or a document into a scanner, and 'scanning' the document into the computer, you then have permanent copy of the document stored on the computer for recall at any time.

Screen saver

A moving picture or pattern that appears on your screen when you have not moved the mouse or press key for a specified period of time.

Scroll

To move through text or graphics (up, down, left or right) to see parts of the file that are not displayed on the screen.

Scroll arrow

An arrow on either end of a scroll bar that you use to scroll through the contents of a window or list box. Click the scroll arrow to scroll one line at a time, or press and hold down the mouse button while pointing at the scroll arrow to scroll continuously.

Scroll bar

A bar that appears at the right and/or bottom edge of a window or list box when its contents are not completely visible. Each scroll bar contains two scroll arrows and a scroll box that enable you to scroll through the contents of the window or list box.

Select

To mark an item so that a subsequent action is carried out on that item. You usually select an item by clicking it with your mouse or pressing a key. After selecting an item, you choose the action that you want to affect the item.

Text book

In a dialog box, a box in which you type information needed to carry out a command. The text box may be blank or may contain text when the dialog box opens.

Title bar

The horizontal bar (at the top of a window) that contains the title of the window or dialog box. On many windows, the title bar also contains the Control-menu box and Maximize and Minimize buttons.

Toolbar

A line of shortcut buttons usually located directly below the menu bar.

Window

A rectangular area on your screen in which you view an application or document. You can open, close, and move windows, and change the size of most windows. You can open several windows at a time, and you can often reduce a window to an icon or enlarge it to fill the entire desktop.

Wrap

To continue text onto the next line rather than stopping when the cursor reaches the end of the current line.